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UTAS CMS

Edit PLUS Workshop V1

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Service Delivery & Support, IT Resources

April 2013

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What is Easy Edit Suite?

Easy Edit Suite is a simple editing interface within MySource Matrix, developed by Squiz.
EES allows users to update and maintain web content easily and efficiently within a simple interface, without the need for extensive training and knowledge of web practices.

Writing for the Web Workshop

Before access can be granted to edit websites in the UWCMS you must complete the **Writing for the Web** module through MyLO.

To access the MyLO module:

- Go to: https://mylo.utas.edu.au/
- Type in your UTAS username and password
- MyLO will open. In the **Course List** section, click: Writing for the Web
- Read the course materials and complete the quiz. You must score 70% or greater to pass

Getting access to a site

Once you've passed the writing for the web module and attended the EES workshop you will need to request editing access to your site. This can be done through a request to the IT Helpdesk by email to service.desk@utas.edu.au or phone x**1818**. Before being able to edit a site, your access must be approved by your head of section. **Please forward written authorisation through with your request.**

Before we start

To edit a page, simply add **/_edit** to the end of the URL and a login screen will be displayed.
Eg: http://www-cms.utas.edu.au/train01 becomes http://www-cms.utas.edu.au/train01/_edit
Login using username and passwords provided and the Edit Plus interface will load.

Features

The Easy Edit Suite allows site editors to add and edit the following:

- Standard pages, People, Research and Redirect pages
- Images
- PDF files, MS Word, Excel and PowerPoint documents
- News items and Events
- Folders

Caveats

Easy Edit Suite is under development. There are a number of features planned, and we are seeking input and feedback. If you have any suggestions, please contact Web & Learning Services.

Contact Web & Learning Services

Email: service.desk@utas.edu.au

Where to from here

All content editors should be familiar with the Web Publishing Policy and Guidelines:
http://www.utas.edu.au/it/web-services/guidelines

There is a style guide to help you create consistent content:
http://www.utas.edu.au/it/web-services/editorial-style-guide2

There are also video tutorials and a user manual developed by Squiz Matrix to assist you using Edit + and the editing interface:
http://vimeopro.com/squizaustralia/easy-edit-suite/video/40918557
http://manuals.matrix.squizsuite.net/edit-plus/chapters/edit-plus-for-squiz-matrix

Workshops

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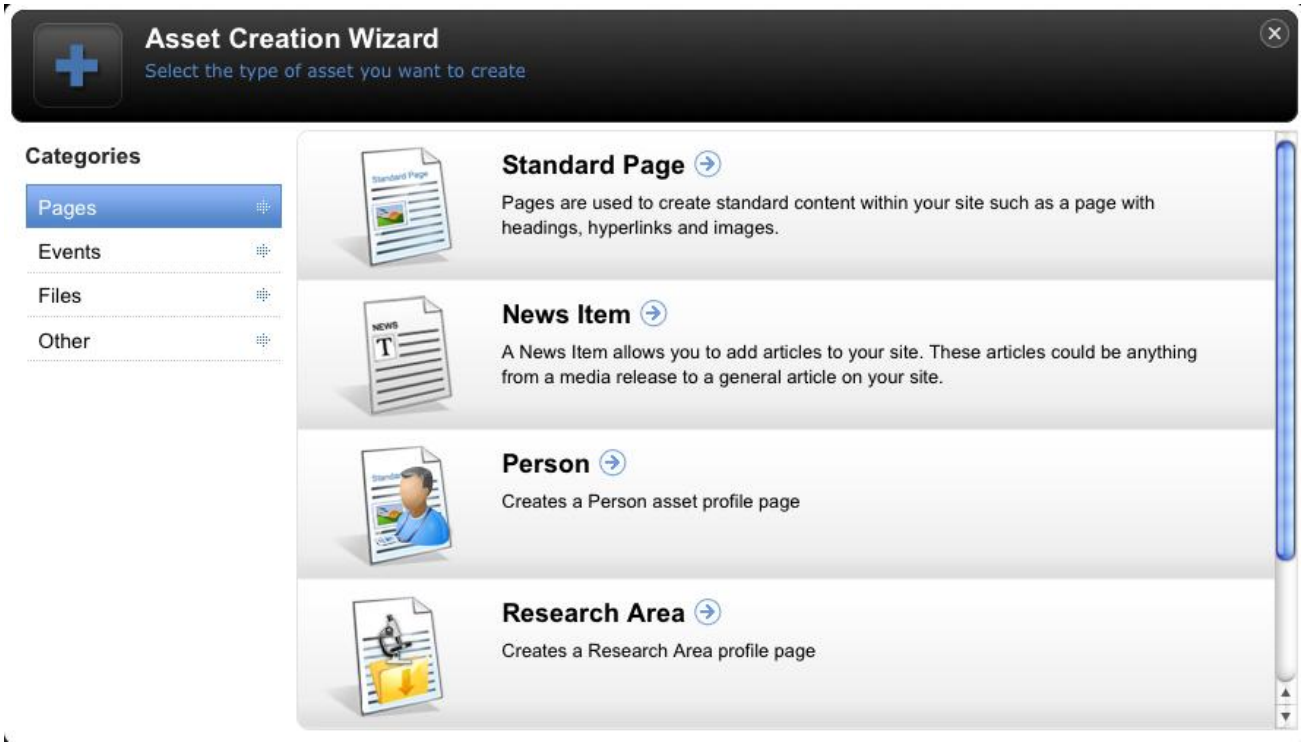
The Easy Edit Suite workshops will explain and demonstrate how to add and edit the following:

1. Create pages and edit content
2. Upload PDF, Word and image files
3. Insert hyperlinks and images
4. Publishing, including safe edit
5. Create News items and Events in listings
6. Create quick links
7. Creating People Assets
8. Creating Research Areas
9. Common questions
10. Further editing techniques

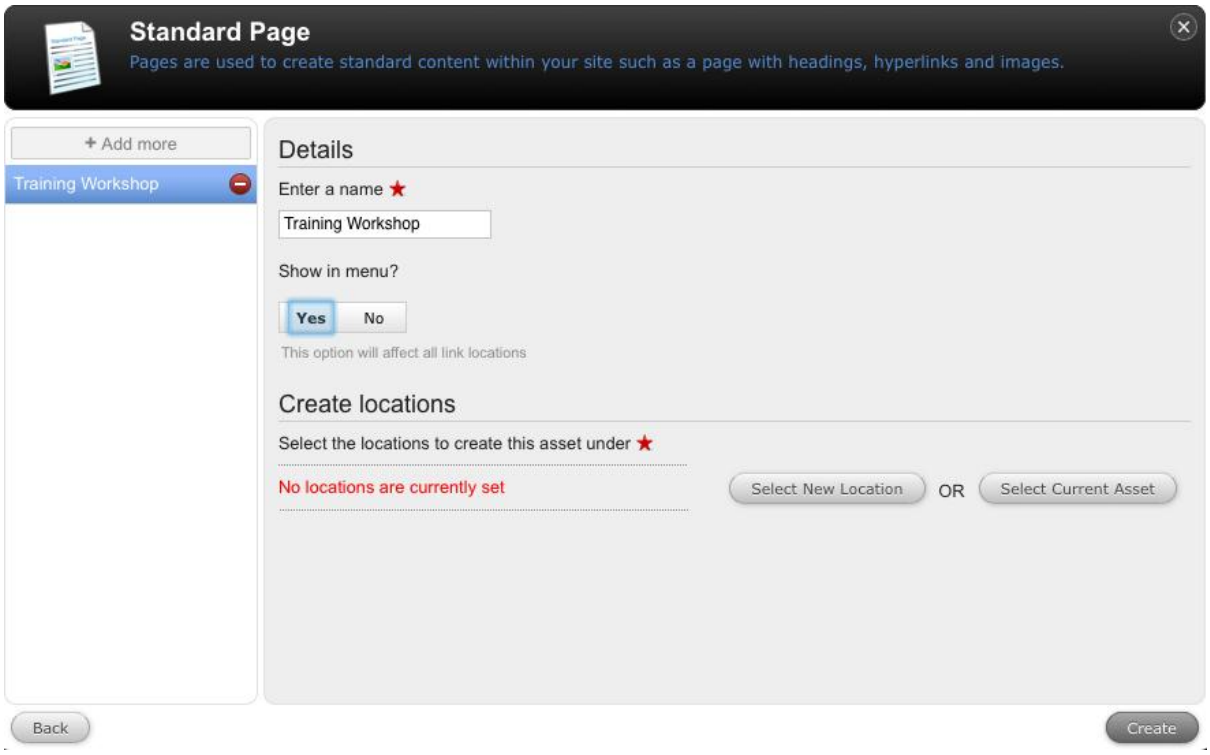
Workshop 1: Create a Page and Edit Content

1. On the EES **Top Task Bar** select **New**

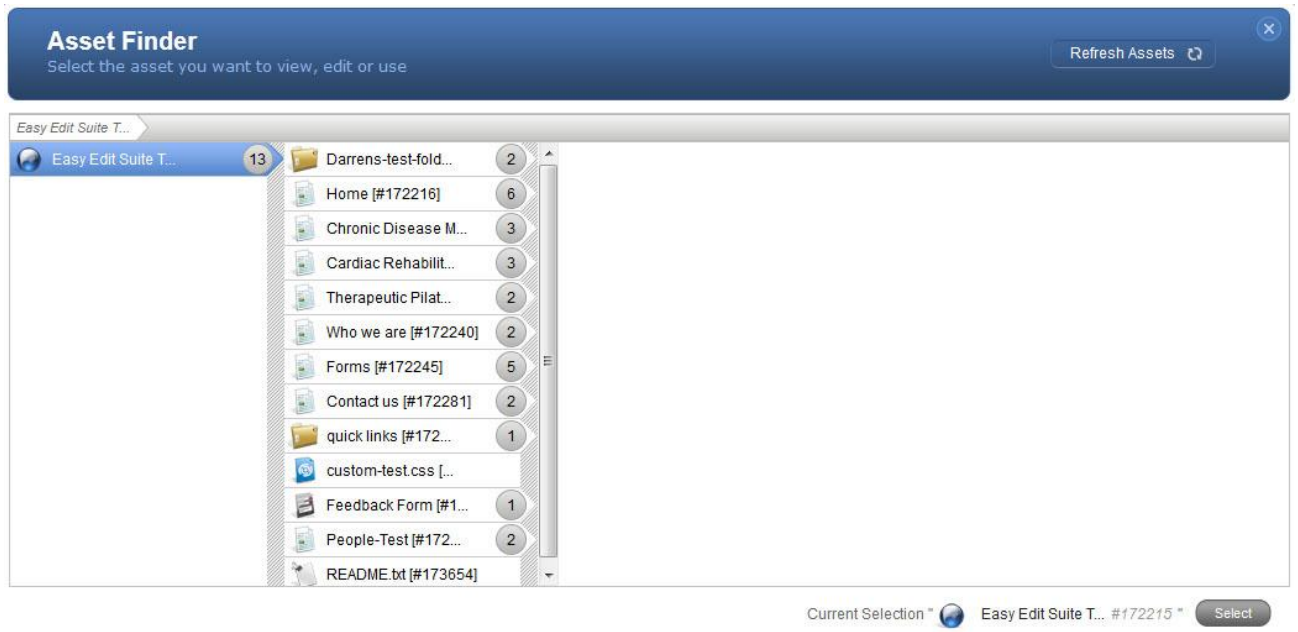
2. The **Asset Creation Wizard** will appear. There are 4 categories **Pages, Events, Files** and **Other**. The default is Pages. Select the **Pages/Standard Page** option


Asset Creation Wizard
Select the type of asset you want to create
Categories
Pages
Events
Files
Other
Standard Page
Pages are used to create standard content within your site such as a page with headings, hyperlinks and images.
News Item
A News Item allows you to add articles to your site. These articles could be anything from a media release to a general article on your site.
Person
Creates a Person asset profile page
Research Area
Creates a Research Area profile page

3. The **Page Details** section will be displayed. **Enter the name of the new page** (e.g. Training Workshop) in the field provided. You also have the option of selecting whether the page is to be displayed in the navigation of the site - it defaults to yes, however you can select **No** if it is not required in the navigation



4. Click on **Select New Location or Select Current Asset** to define the create location for the new asset. Using the **Asset Finder** screen highlight the parent asset and click on **Select**. In this example the site has been selected as being the parent, the parent has 13 child assets



5. The **Standard Page** screen will appear showing where the asset will be created, click on **Create** to complete the process
6. The asset has now been created. The options available are:
    - Close the wizard - which will return you to the last screen you were viewing
    - Restart the wizard - to create another asset
    - Edit - to start editing this asset

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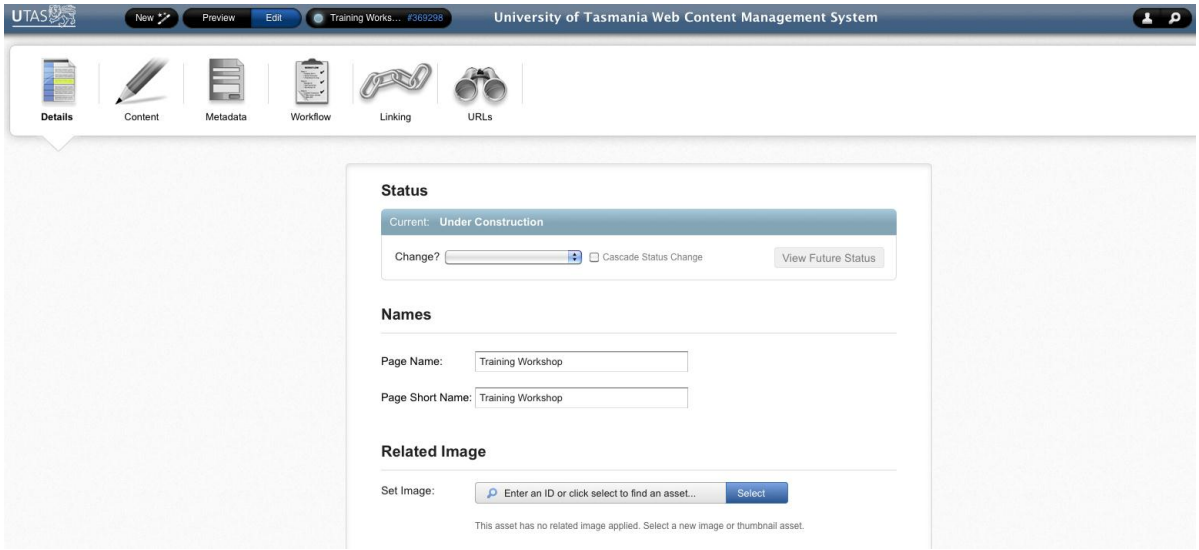
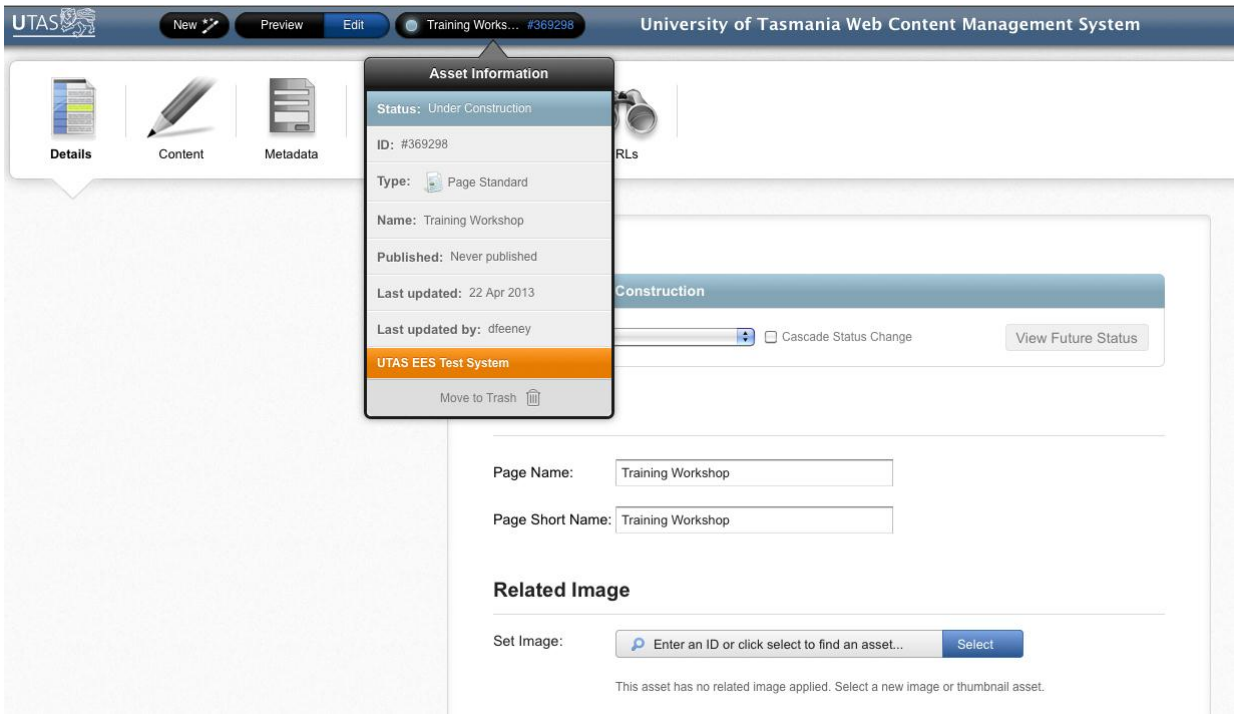
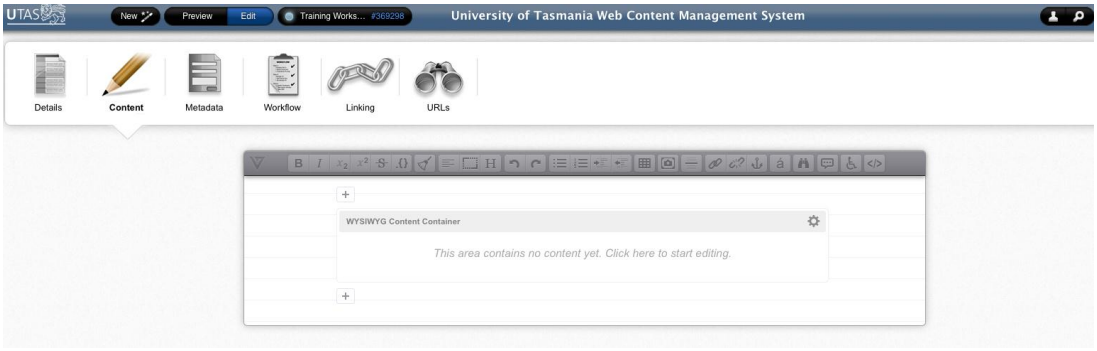
7. Click on the **Edit** button. The details tab will be displayed, showing the current status of the asset, the page name and the thumbnail details. To edit content select the **Content** tab**.**

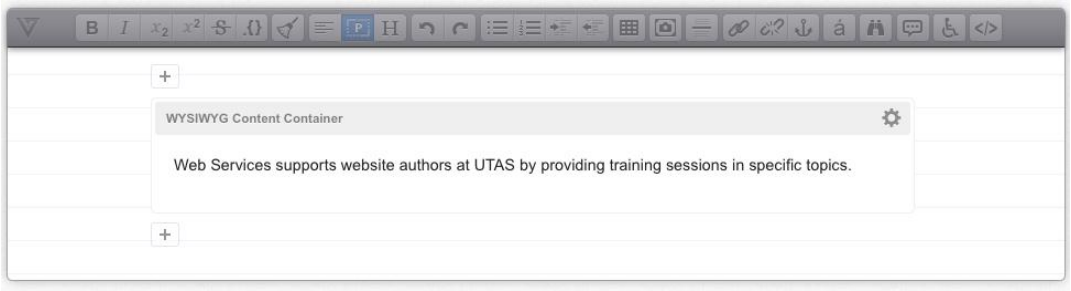


8. If you click on the title of the asset in the top menu bar, you will see a pop-up window detailing the newly created asset information: Asset name, date published, last updated, and by whom. It also gives you the option to **move the asset to the trash**.



9. Click in the area where it reads, "*This area contains no content yet. Click here to start editing"*. The cursor will appear in this window. Now type 'Web Services supports website authors at UTAS by providing training sessions in specific topics.' When complete, click **Save**.




WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.

10. Place the cursor at the end of the last sentence and press **Enter** to start a new paragraph.

11. Locate a MS Word document on your computer. If you can't find one, open a blank document and copy and paste some content in it from a web page then save to your desktop. Now copy this content from the Word doc and return to Easy Edit Suite and paste it into the editor.

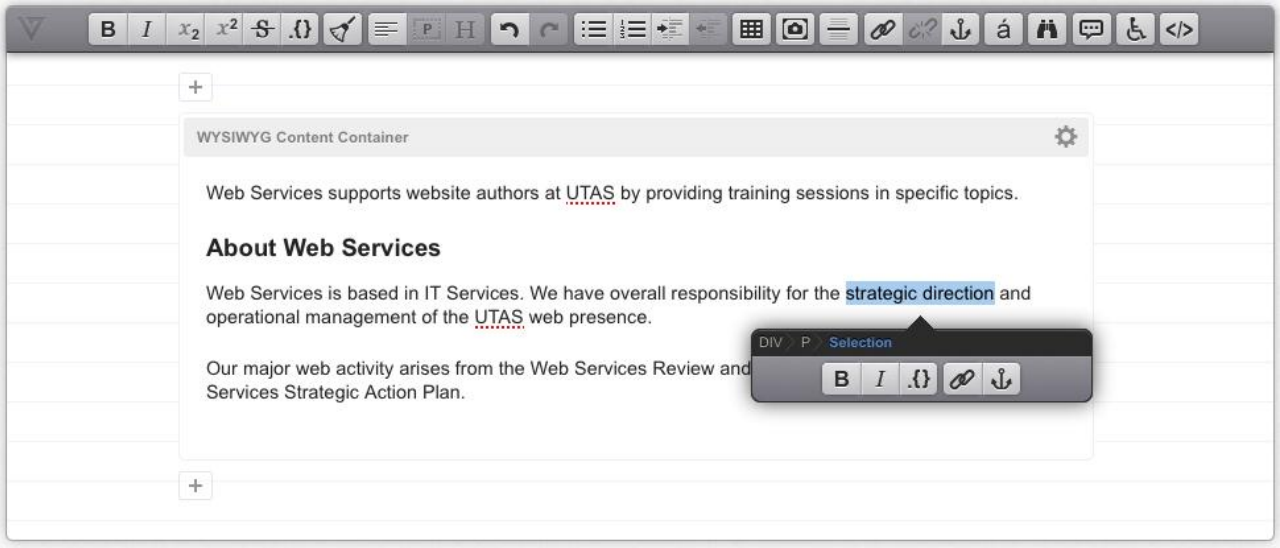
12. The editor automatically removes all of the MS embedded styling for the content, but it will retain any hyperlinks.
13. To remove all of the formatting, including the hyperlinks from this text, you can click the Remove Format icon.

14. If there are heading, bold or italicised text in the content you will need to manually add these using the inline editor menu.

15. Select the text you want to format. Eg., you want to add a header style to the heading of your text. An inline editor pops up with basic formatting options.

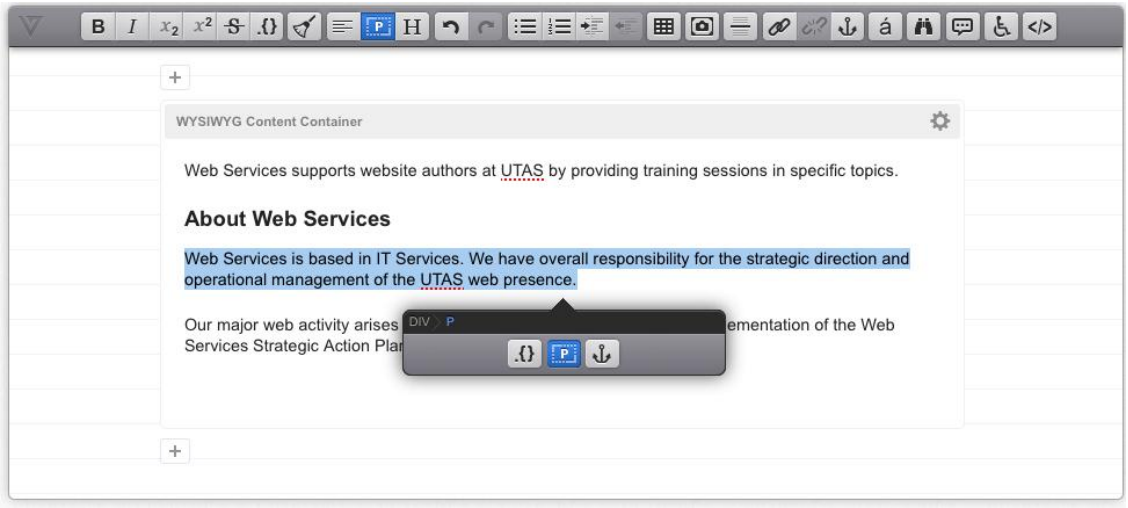
16. There are three options for the inline editor, detailed below. The inline toolbars provide breadcrumb style navigation of the elements in your selected content. This allows you to specify exactly the content you are editing. In the figure below you can see the Div > P > Selection breadcrumb at the top of the box.

    (a) The **first** is when you **select a section of text**. The inline editor appears as below. In this case you have the options to:
    - Make the selected text bold
    - Italicise the text
    - Insert a class
    - Insert a link
    - Insert an anchor


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and
Services Strategic Action Plan.
DIV
P
Selection

(b) The **second** is when you **select the entire paragraph or div**. The inline editor appears as below. In this case you have the option to:

- Insert a class
- Change the paragraph to a division
- Add a blockquote style
- Add a 'pre' element to the text
- Insert a link
- Insert an anchor


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises
ementation of the Web
Services Strategic Action Pla
DIV
P

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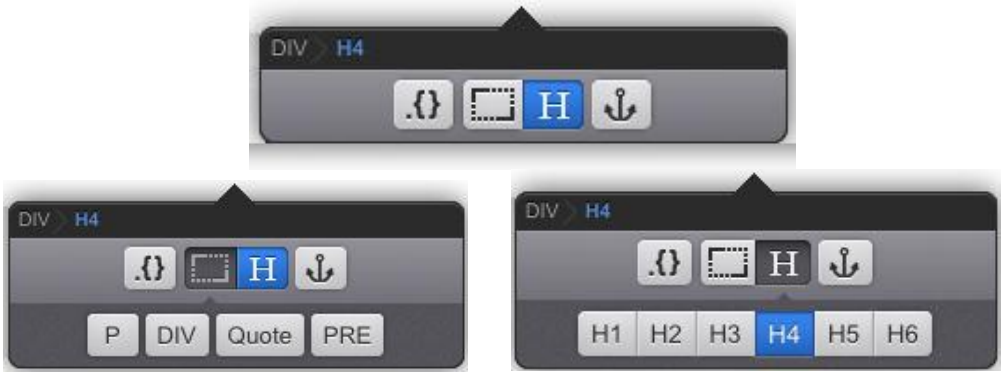
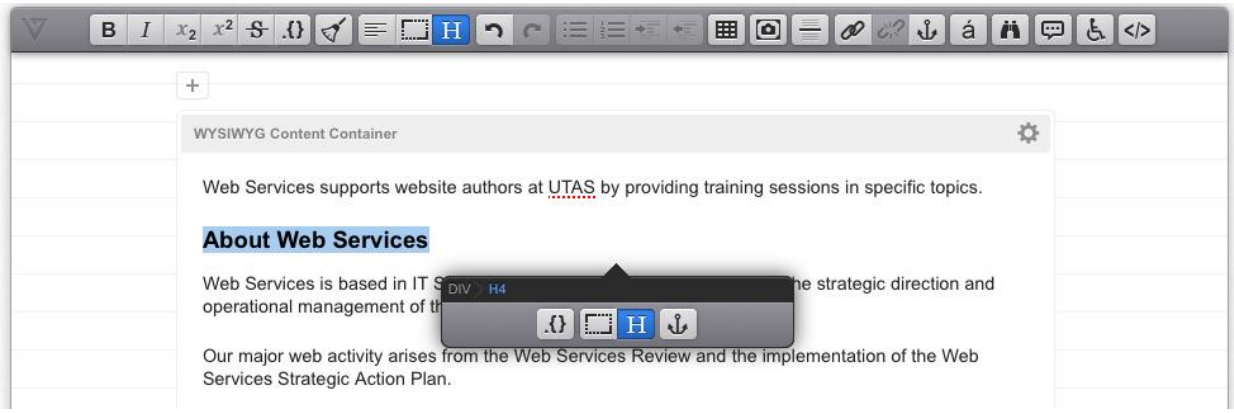
(c) The **third** is when you **select a pre-styled element, such as a header**. The inline editor appears as below. In this case you have the option to:

- Insert a class
- Change the paragraph to a division
- Add a blockquote style
- Add a 'pre' element to the text
- Add a heading style

Tip: *Web Services recommends H4 and H5. Do not use Headings 1, 2 or 3 in the main content as these are already used in the rest of the web template. Adding Heading styles in logical order is required for page accessibility. It can also help with SEO (Search Engine Optimisation) results.*

- Insert an anchor



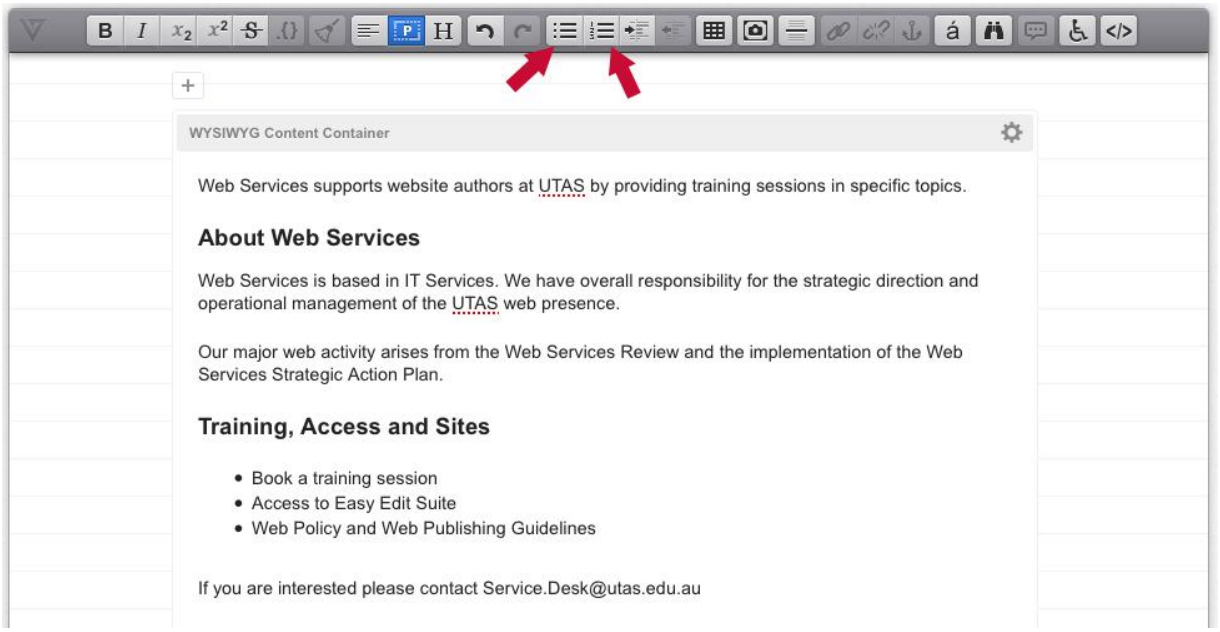

WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.

17. If you have a spelling error in your content the word will be underlined in red. There is no spell check tool, so you will need to pay attention to any text with red underline.

18. Create a bulleted list as shown below:

- Place the cursor after the last sentence press **Enter/Return**
- Type in the text **Training, Access and Sites** and press return, now highlight the text and make it a H4 heading
- Type in the following items, pressing return after each one:
  - Book a training session
  - Access to Easy Edit Suite
  - Web Policy and Web Publishing Guideline

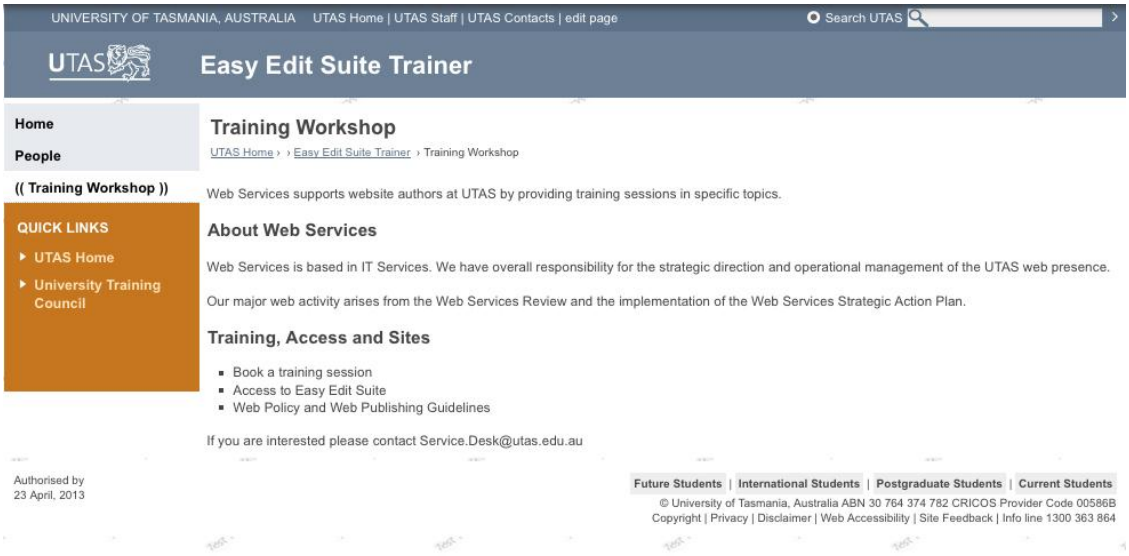
- Now select these 3 items and click on the either the unordered or ordered list icon
- **Save your changes**


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines
If you are interested please contact Service.Desk@utas.edu.au

Preview

1. To review the results select the **Preview** button located on the **Top Task bar.**

2. The page will open and the new content and formatting will appear within the UTAS design with styles applied.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UTAS Home | UTAS Staff | UTAS Contacts | edit page
Search UTAS
UTAS
Easy Edit Suite Trainer
Home
People
((Training Workshop))
QUICK LINKS
UTAS Home
University Training Council
Training Workshop
UTAS Home › › Easy Edit Suite Trainer › Training Workshop
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines
If you are interested please contact Service.Desk@utas.edu.au
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23 April, 2013
Future Students | International Students | Postgraduate Students | Current Students
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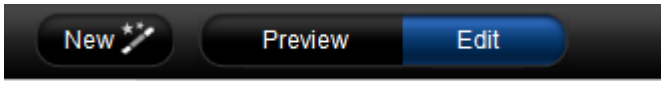
3. To return to the content editor, select the **Edit** button located on the **Top Task bar.**

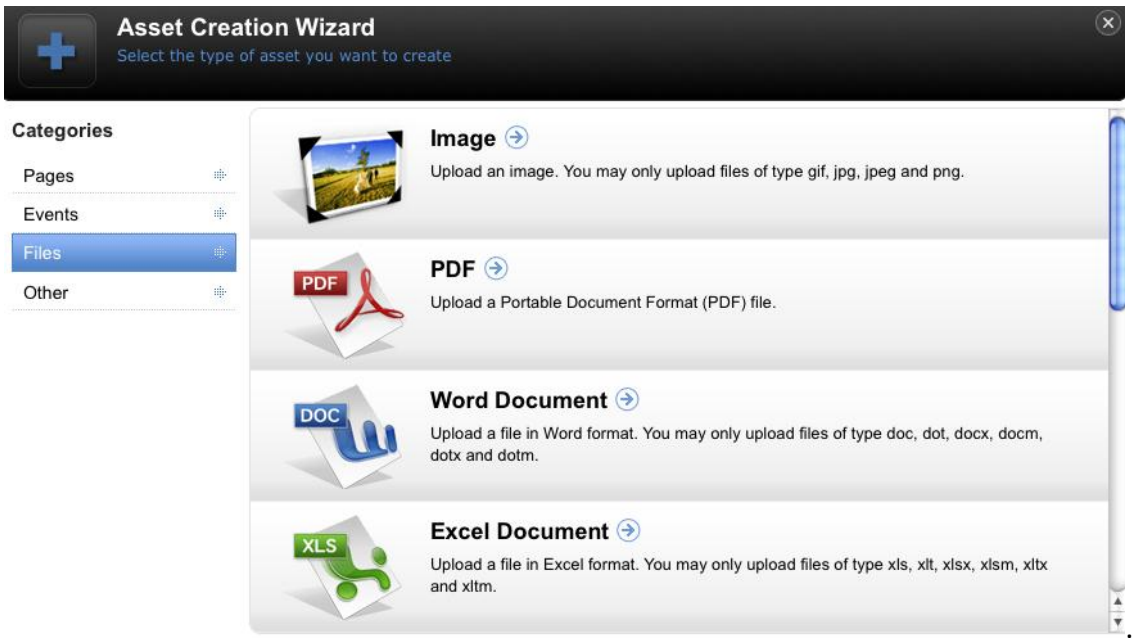
Workshop 2: Add PDF and Image Files

Part 1 – Add a PDF

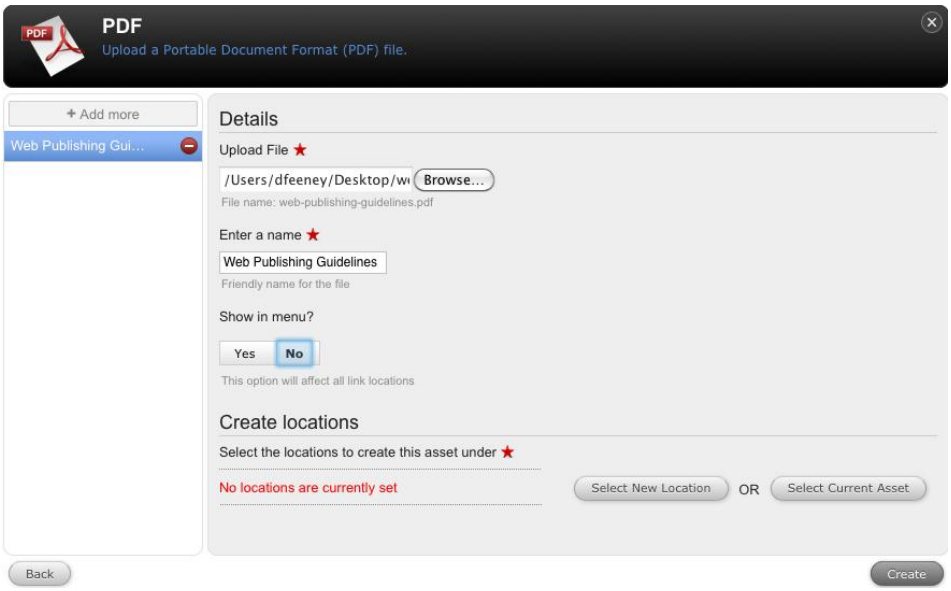
1. On the EES **Top Task bar** select **New**.



2. The **Asset Creation Wizard** will appear. **Select** the Category **Files** and then select **PDF**.


Asset Creation Wizard
Select the type of asset you want to create
Categories
Pages
Events
Files
Other
Image
Upload an image. You may only upload files of type gif, jpg, jpeg and png.
PDF
Upload a Portable Document Format (PDF) file.
Word Document
Upload a file in Word format. You may only upload files of type doc, dot, docx, docm, dotx and dotm.
Excel Document
Upload a file in Excel format. You may only upload files of type xls, xlt, xlsx, xlsm, xltx and xltm.

3. The **Create PDF Wizard** will open:
   - Click on **Browse** and locate the PDF document to upload
   - **Enter** a friendly (easily identifiable) name for the file in the **Title** field
   - Set **Show in Menu** to **No**



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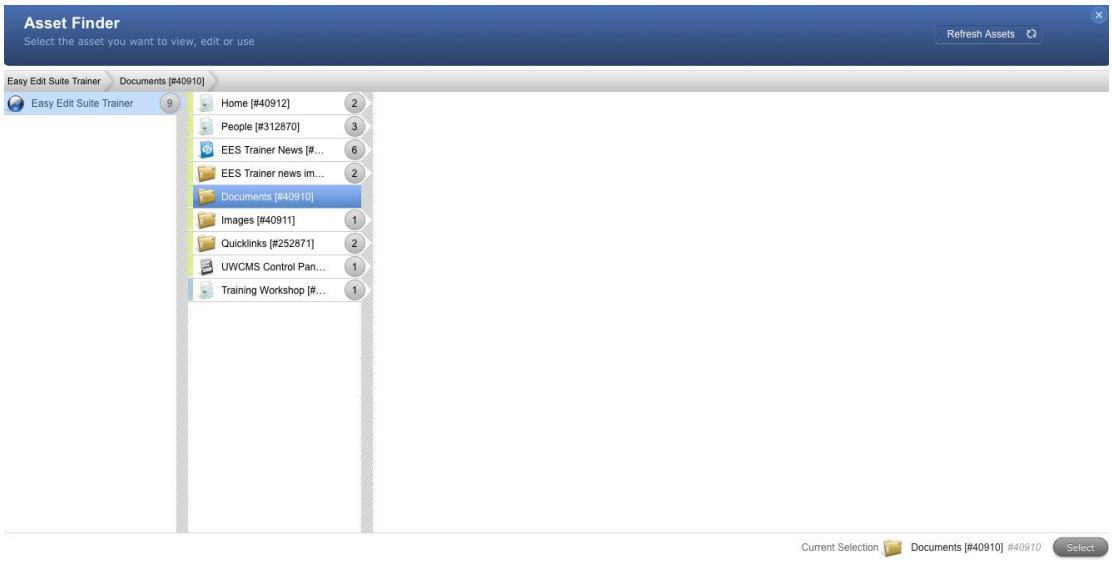
- Click on **Select New Location** to define the assets location. Using the **Asset Finder**, click on the parent asset (in this instance the **Documents** folder) and click on **Select.**

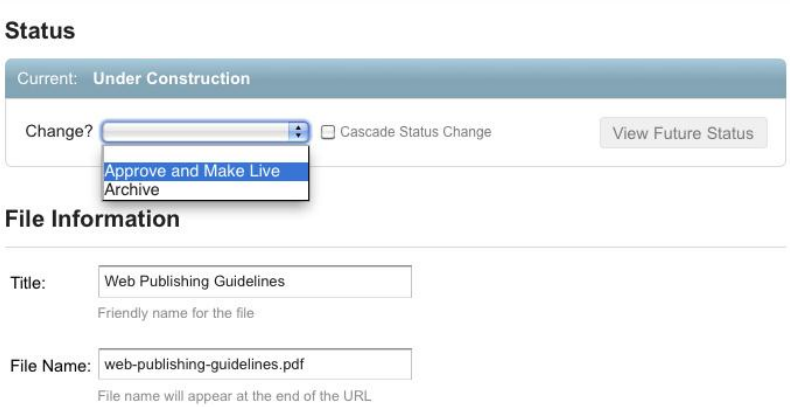


- You will now return to the PDF Wizard screen. Click **Create** to complete the process.

4. The asset has now been created. The options available are:
   - Close the wizard - which will return you to the last screen you were viewing
   - Restart the wizard - to create another asset
   - Edit - to start editing this asset

PDF
Upload a Portable Document Format (PDF) file.
Wizard Complete
All asset(s) in the queue have now been processed. You can now edit the asset(s), restart the wizard or close the wizard and return to the last screen you were viewing.
web-publishing-guidelines.pdf
Edit
Restart Wizard

5. Select **Edit**.
6. On the details screen use the **Change ?** drop down box and select **Approve and Make Live**.
7. Save.



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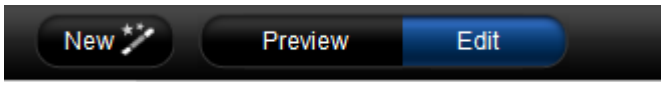
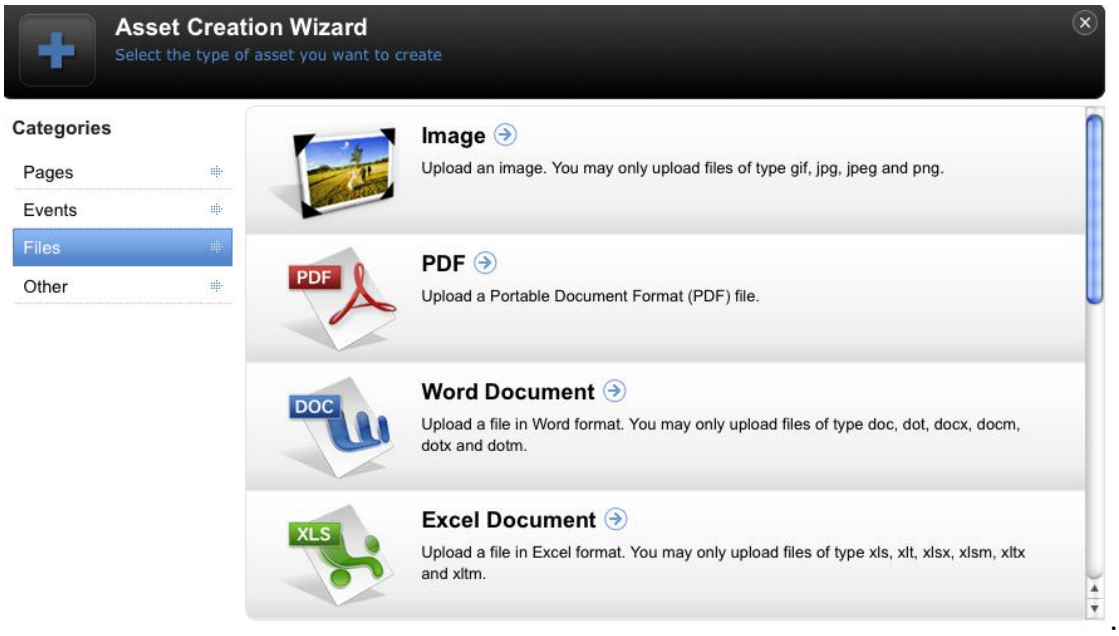
Part 2 – Add an Image

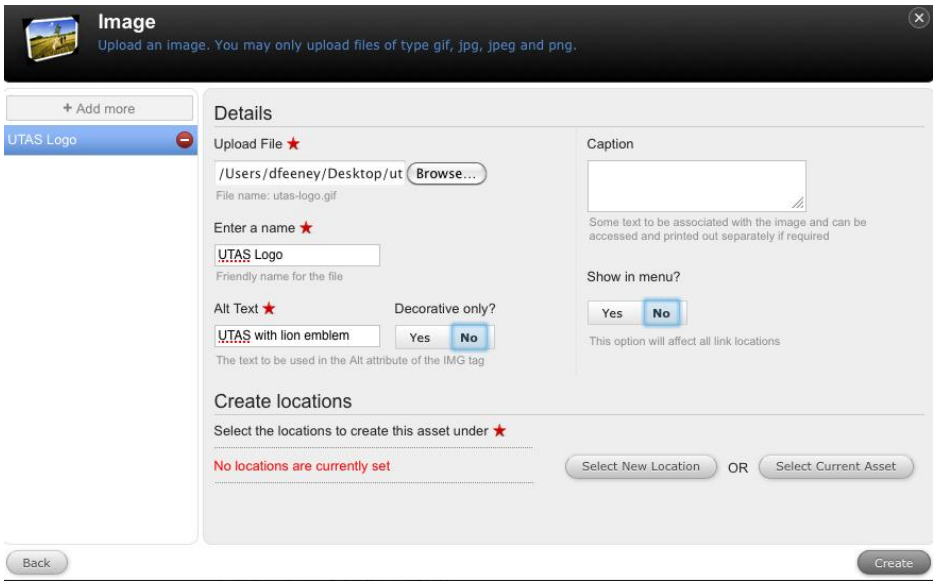
1. On the EES **Top Task bar** select **New**.



2. The **Asset Creation Wizard** will appear. **Select** the Category **Files** and then select **Image**.


Asset Creation Wizard
Select the type of asset you want to create
Categories
Pages
Events
Files
Other
Image
Upload an image. You may only upload files of type gif, jpg, jpeg and png.
PDF
Upload a Portable Document Format (PDF) file.
Word Document
Upload a file in Word format. You may only upload files of type doc, dot, docx, docm, dotx and dotm.
Excel Document
Upload a file in Excel format. You may only upload files of type xls, xlt, xlsx, xlsm, xltx and xltm.

3. The **Create Image Wizard** will open:
   - Click on **Browse** and locate the image to upload
   - **Enter** a friendly (easily identifiable) name for the image in the **Title** field
   - **Enter** appropriate details about the image in **Alt Text** field
   - Set **Show in Menu** to **No**
   - Set **Decorative Only** to **No** (in some instances an image will be used purely for visual appeal and thus is considered decorative and does not requre ‘alt’ text)



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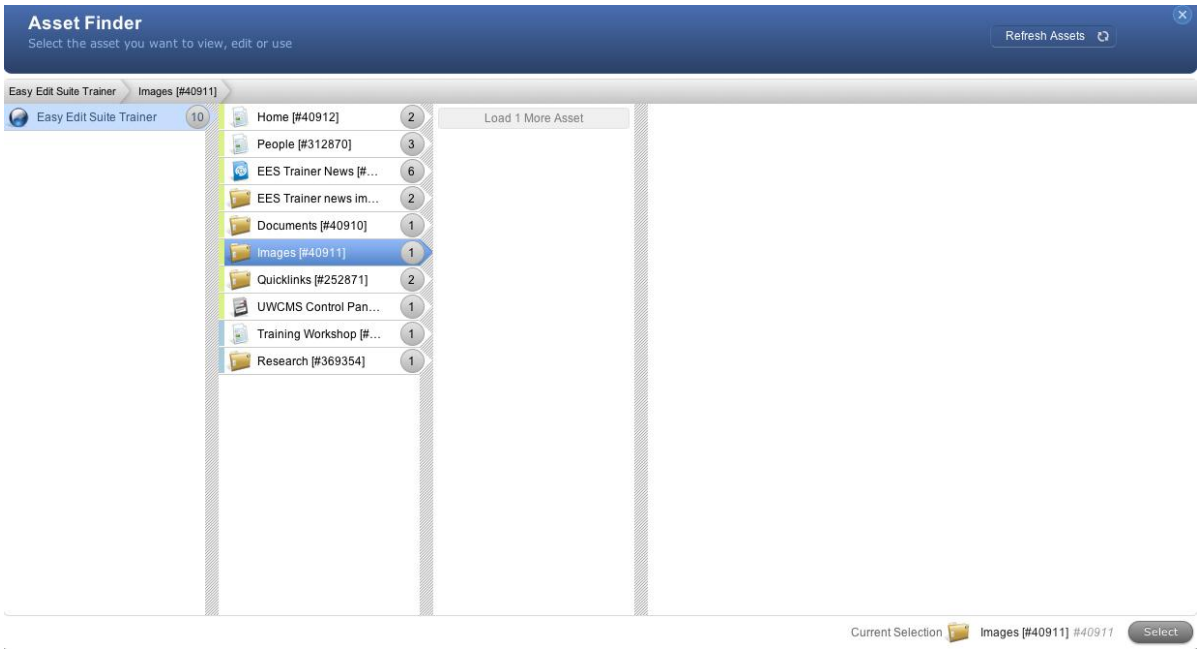
- Click on **Select Parent** to define the assets location. Using the **Asset Finder** screen highlight the parent asset (in this instance the **Images** folder) and click on **Select**



Tip: It's good practice to store all images in an **Images** folder.

- The **Image Wizard** screen will appear showing the details and where the asset will be created, click on **Create** to complete the process

4. The asset has now been created. The options available are:
   - Close the wizard - which will return you to the last screen you were viewing
   - Restart the wizard - to create another asset
   - Edit - to start editing this asset

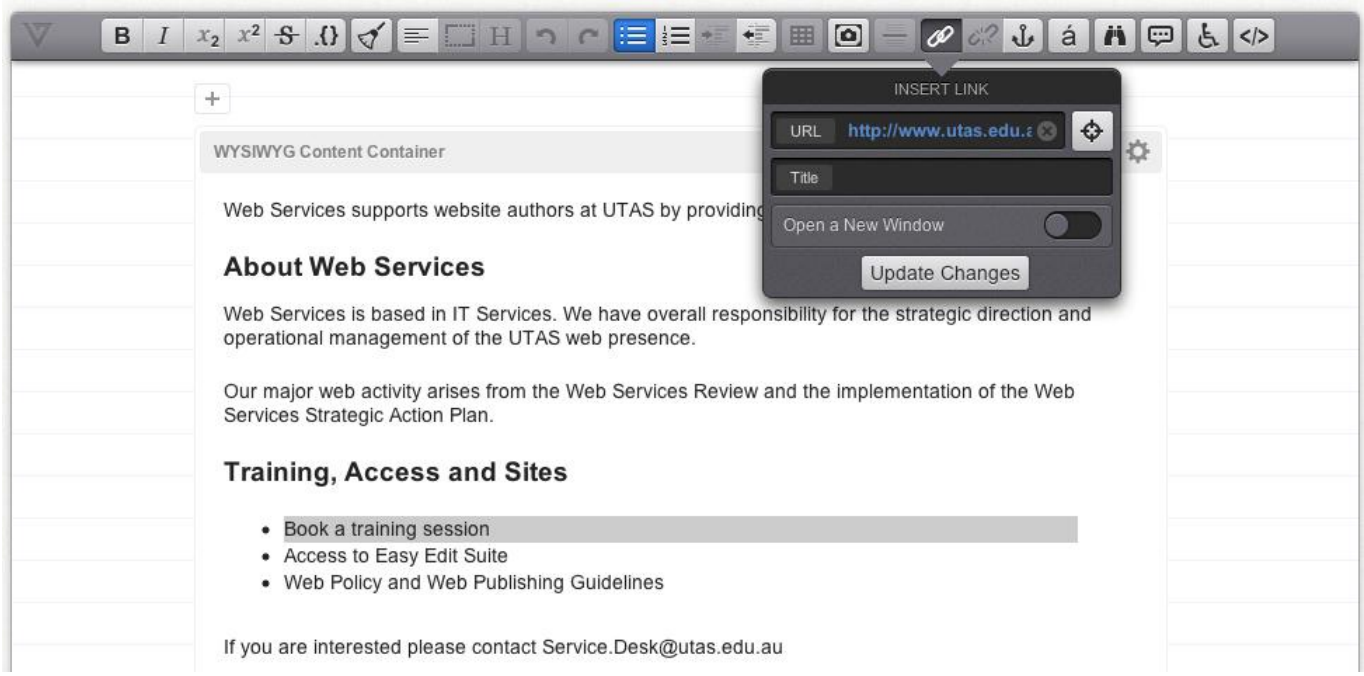
5. Select **Edit**.
6. On the details screen use the **Change ?** drop down box and select **Approve and Make Live**.
7. **Save**.

Workshop 3: Insert Hyperlinks and Images

Part 1 - Insert Hyperlinks

(a) Using the URL field

1. Select the **Content** tab and click within the body of the text.
2. Depending on whether you want to select an entire element or a section only, use the **Insert Link** icon either from the editor's top menu or the inline editor.


INSERT LINK
URL
http://www.utas.edu.a
Title
Open a New Window
Update Changes
WYSIWYG Content Container
Web Services supports website authors at UTAS by providing
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines
If you are interested please contact Service.Desk@utas.edu.au

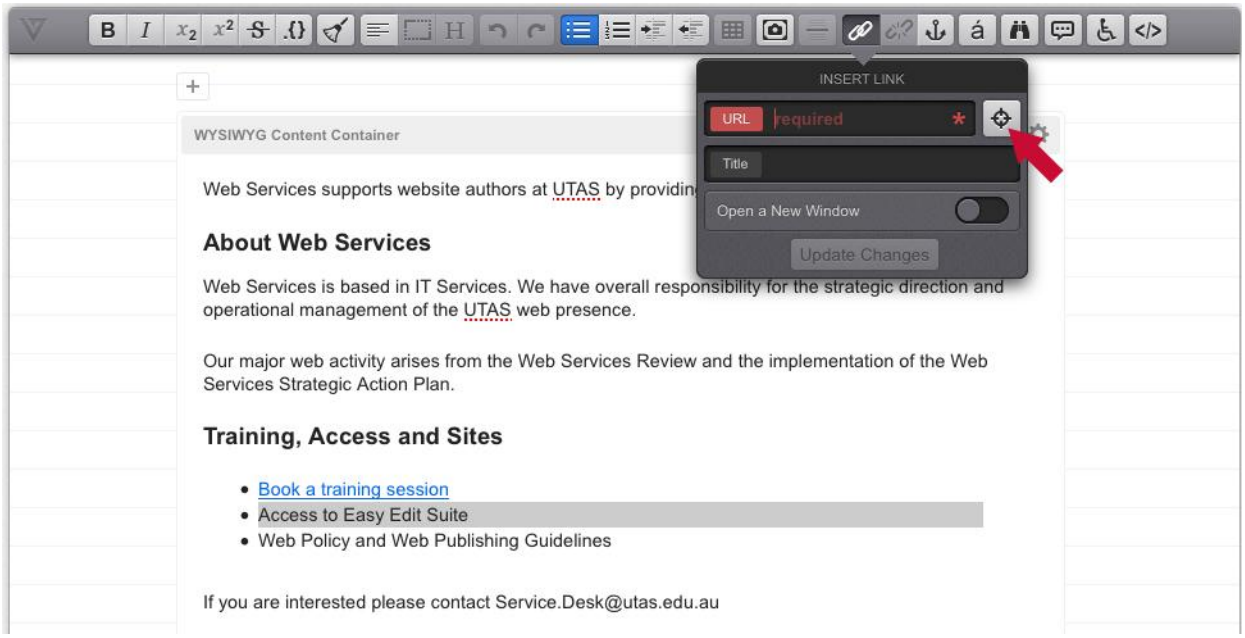
3. The **Insert Link** pop up will appear. In the **URL** field **enter** in **www.utas.edu.au** (or whatever URL you wish to link to).

Note: If you are linking to another asset within your site, it is preferable that you use the asset picker along with the asset finder to navigate to the relevant asset. This is shown in the next item. However, if you are linking to a URL outside your site, use the URL option.

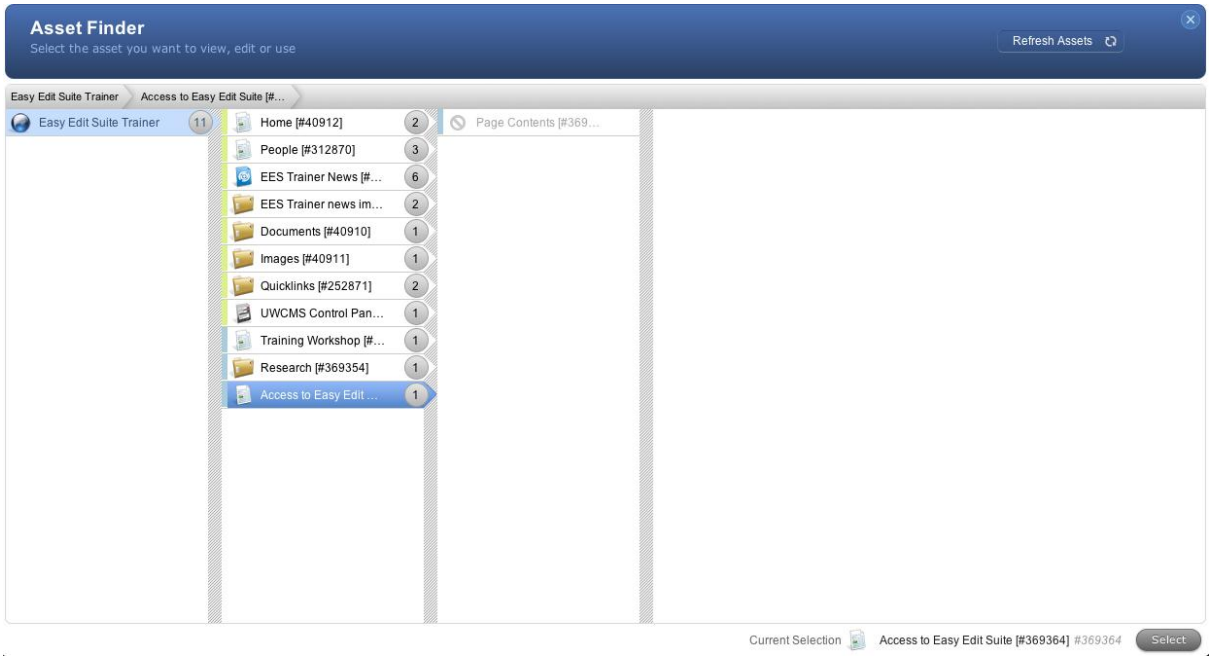
4. Click **Update Changes**, and then **Save**.

(b) Using the Asset Finder

1. Highlight the text "**Access to Easy Edit Suite**" and click the **Insert Link** icon.

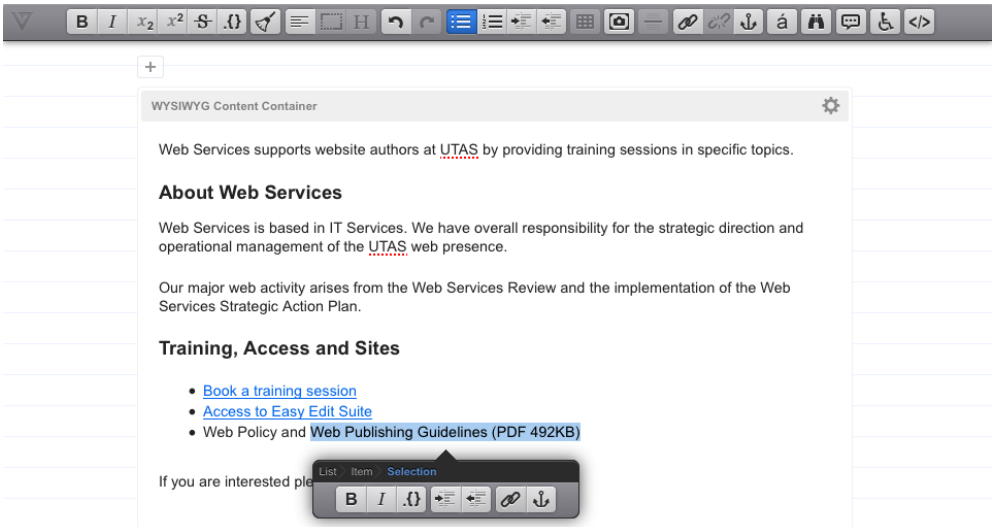

INSERT LINK
URL
required
Title
Open a New Window
Update Changes
WYSIWYG Content Container
Web Services supports website authors at UTAS by providin
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines
If you are interested please contact Service.Desk@utas.edu.au

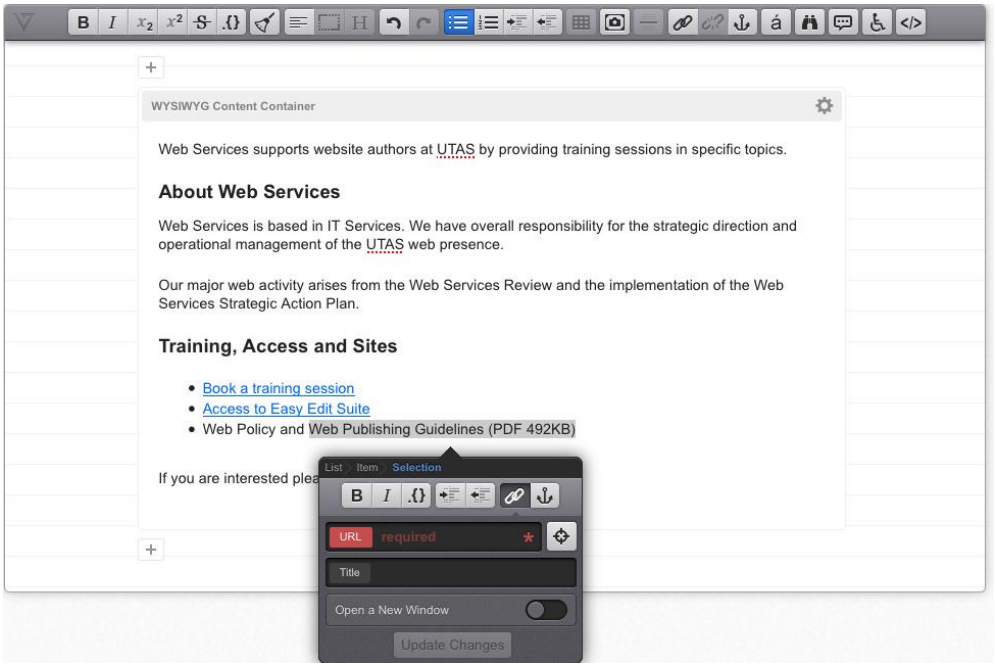
2. Click on the asset finder icon to create the link. Navigate to the standard page "**Access to Easy Edit Suite**" within the asset finder and click Select.


Asset Finder
Select the asset you want to view, edit or use
Refresh Assets
Easy Edit Suite Trainer
Access to Easy Edit Suite [#...
Easy Edit Suite Trainer 11
Home [#40912] 2
People [#312870] 3
EES Trainer News [#... 6
EES Trainer news im... 2
Documents [#40910] 1
Images [#40911] 1
Quicklinks [#252871] 2
UWCMS Control Pan... 1
Training Workshop [#... 1
Research [#369354] 1
Access to Easy Edit ... 1
Page Contents [#369...
Current Selection
Access to Easy Edit Suite [#369364] #369364
Select

3. This will bring you back to the *Insert Link* screen that has automatically inserted the asset ID into the URL field. Click **Update Changes** and **Save**.

4. You can also use the asset finder to insert a link that is a PDF.
5. Select the link text, in this case: "**Web Publishing Guidelines**".
   Note. When adding links to files, you need to add the file type and size after the document title e.g., Web Publishing Guidelines (PDF 492KB).


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines (PDF 492KB)
If you are interested ple
List Item Selection


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines (PDF 492KB)
If you are interested plea
List Item Selection
URL required
Title
Open a New Window
Update Changes

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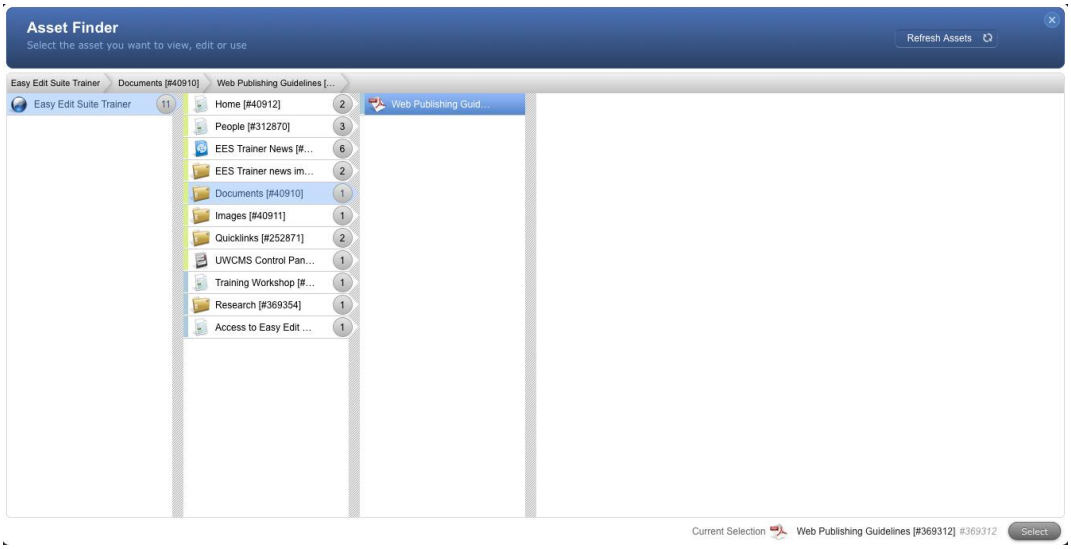
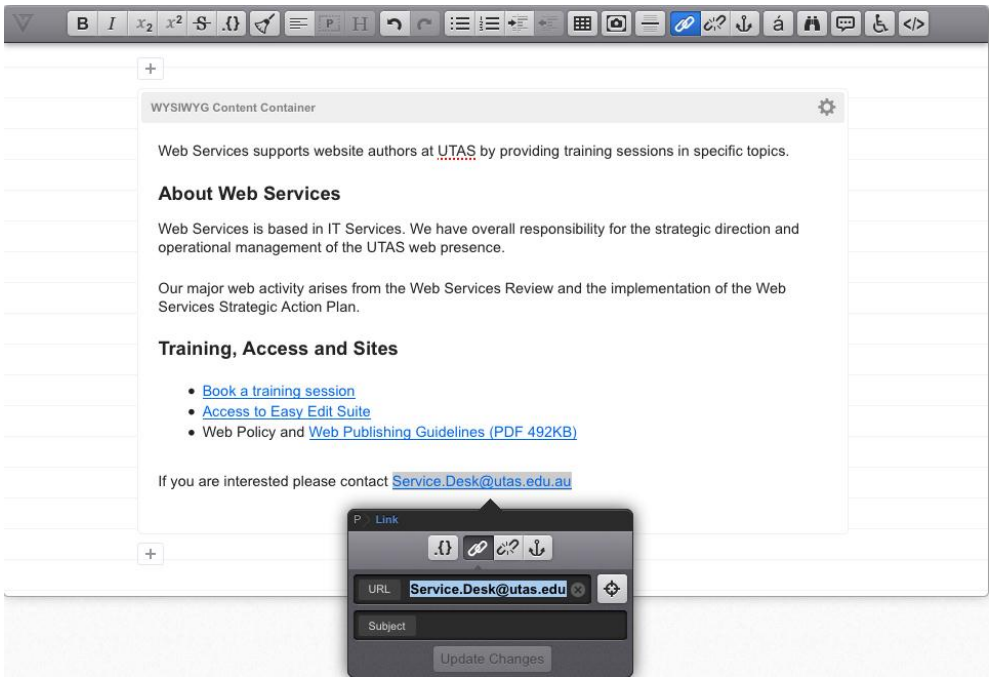
6. Click on the asset finder icon to create the link. Navigate to the **web-publishing-guidelines.pdf** within the **Documents** folder and click Select.



7. This will bring you back to the *Insert Link* screen that has automatically inserted the asset ID into the URL field. Click **Update Changes** and **Save**.

Tip: In accordance with UTAS Web policies – ensure you include the file size and type for all documents (e.g., MS Word 492KB)

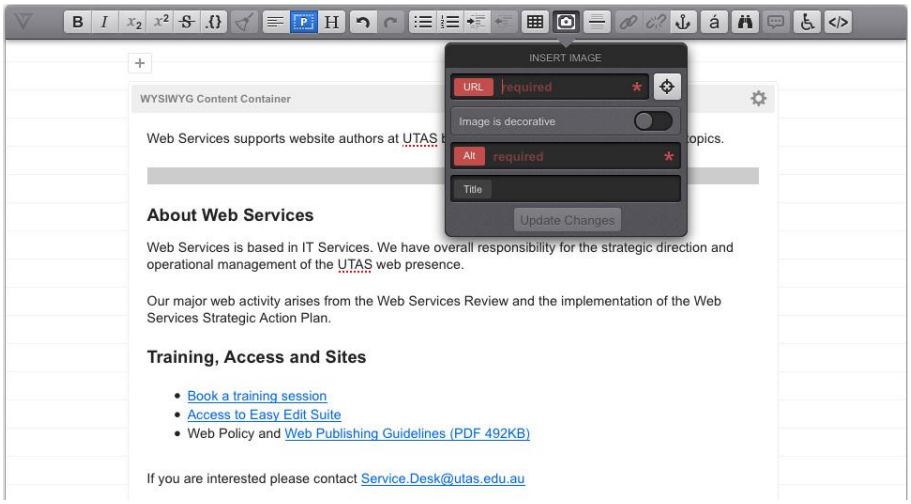
8. Scroll to the bottom of the content and highlight contact **Service.Desk@utas.edu.au** click the **Insert Link** button. In the URL field enter the email address to wish to link, in this case **Service.Desk@utas.edu.au**.


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines (PDF 492KB)
If you are interested please contact Service.Desk@utas.edu.au
P Link
URL
Service.Desk@utas.edu
Subject
Update Changes

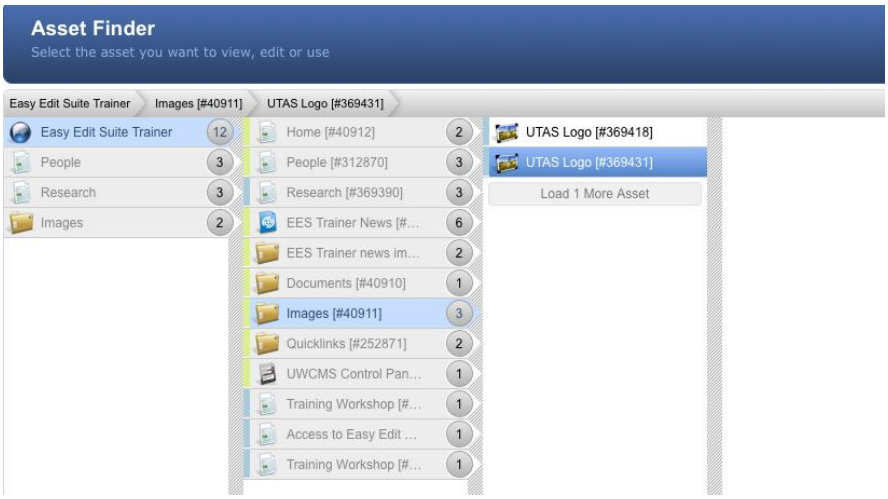
9. Click **Update Changes** and **Save**.

Part 2 – Insert an image

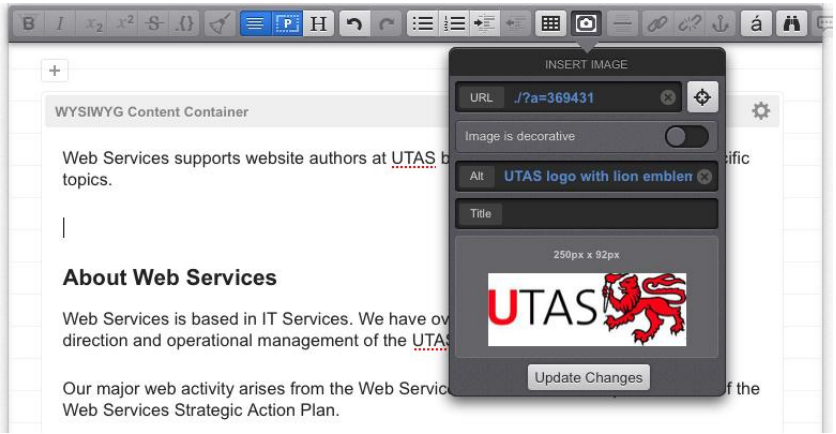
1. Place the cursor at the end of the first sentence and press **Enter**. Click on the **Insert Image** icon.


INSERT IMAGE
URL required
Image is decorative
Alt required
Title
Update Changes
WYSIWYG Content Container
Web Services supports website authors at UTAS
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.
Our major web activity arises from the Web Services Review and the implementation of the Web Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines (PDF 492KB)
If you are interested please contact Service.Desk@utas.edu.au

2. The **Insert Image** pop up will appear. Click on the asset finder icon to create the link. Navigate to the image asset "**UTAS_logo.jpg**" in the **Images** folder and click Select.



3. This will bring you back to the *Insert Link* screen that has automatically inserted the asset ID into the URL field. Click **Update Changes** and **Save**.


INSERT IMAGE
URL ./?a=369431
Image is decorative
Alt UTAS logo with lion emblem
Title
250px x 92px
Update Changes
WYSIWYG Content Container
Web Services supports website authors at UTAS
topics.
About Web Services
Web Services is based in IT Services. We have ov
direction and operational management of the UTAS
Our major web activity arises from the Web Servic
Web Services Strategic Action Plan.

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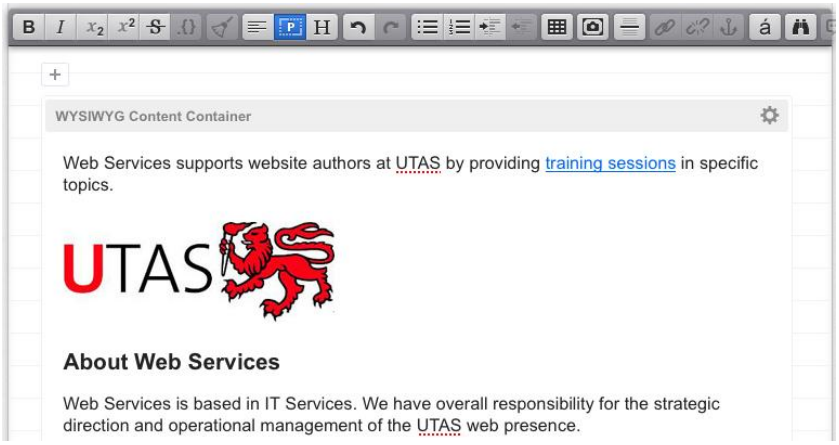
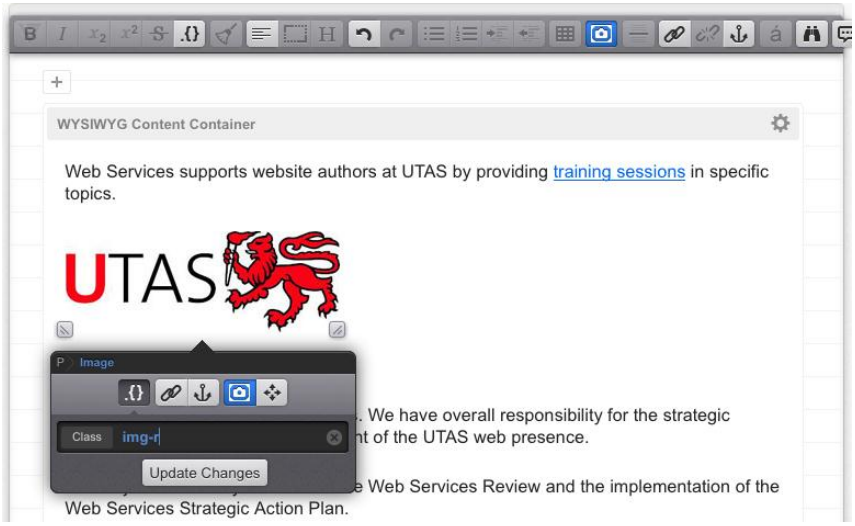
Note: The alt field is automatically filled in with the alt text you provided when you initially added the image. **Alt text is mandatory for all informative images in your website** (but not for decorative)**.**


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
UTAS
About Web Services
Web Services is based in IT Services. We have overall responsibility for the strategic direction and operational management of the UTAS web presence.

4. Add **Image Class** if required (eg. img-r; img-l; img-border)


WYSIWYG Content Container
Web Services supports website authors at UTAS by providing training sessions in specific topics.
UTAS
Image
Class
img-r
Update Changes
Web Services Review and the implementation of the Web Services Strategic Action Plan.

5. **Preview** the Training Workshop page.

Workshop 4: Publishing

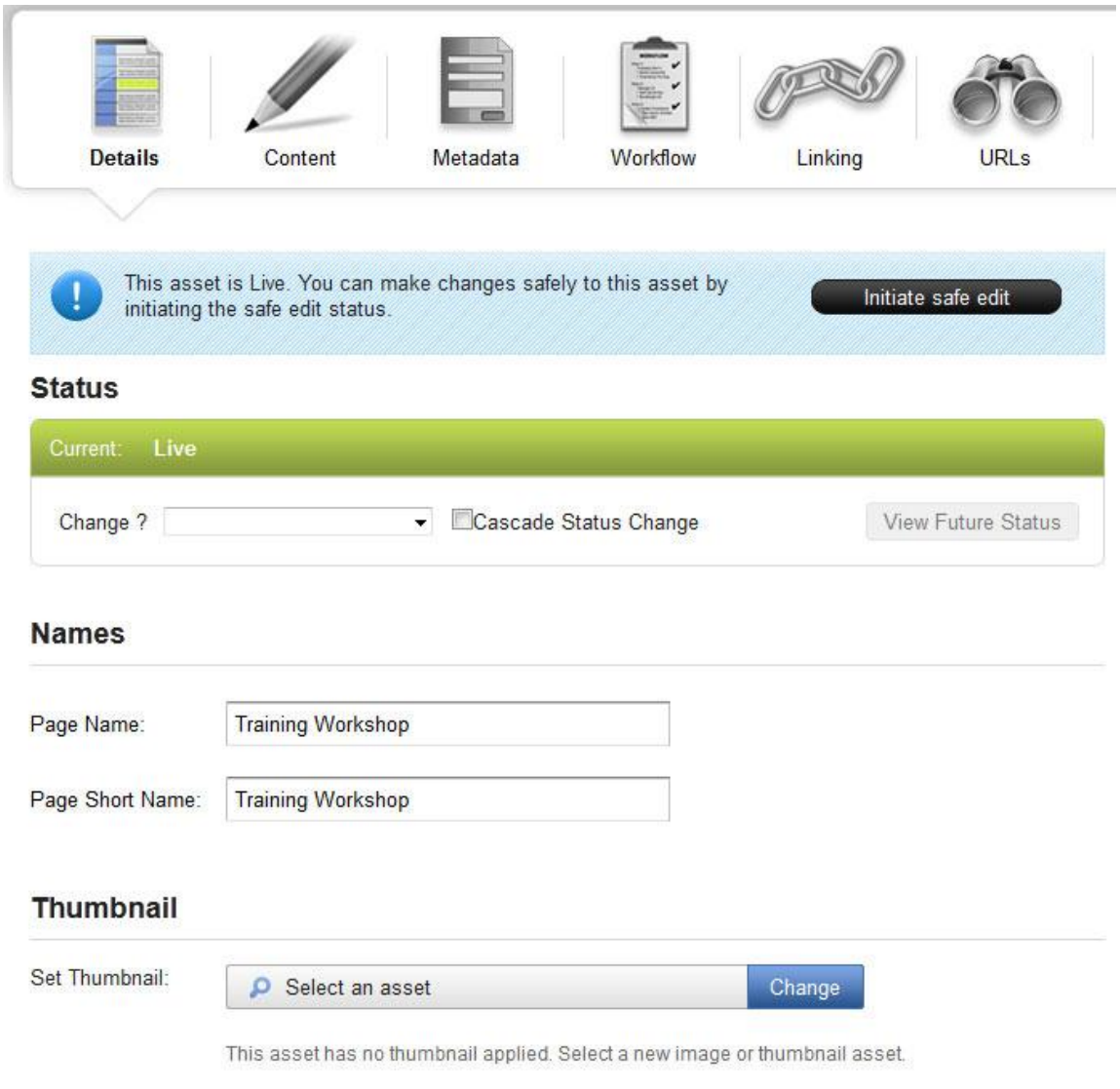
Status

Under Construction		The asset is being built and not available to the public
Live		The asset is available to the public
Safe Edit		A snapshot of the Live asset is delivered by the system, and edits may be made without being visible to the public
Archived		The asset is hidden from the public and is not editable

Part 1 - Approve and make live

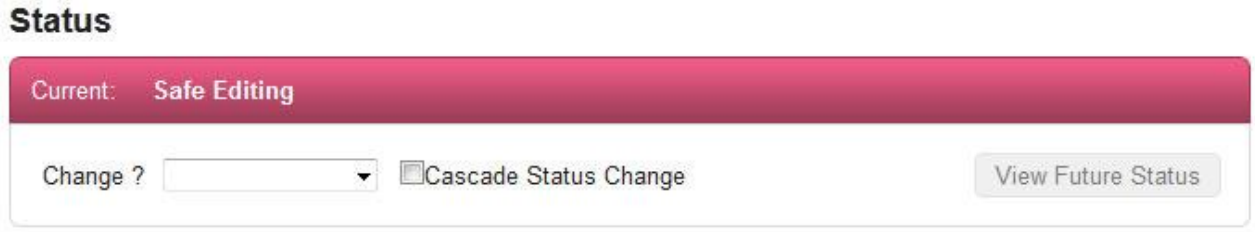
1. Return to the details screen of the Training page. In the **Changes ?** drop down select **Approve and Make Live** and click **Save**.

Note: You may have only been given 'Write' access to the site and therefore cannot make assets live. This is a decision made by the heads of some sections. If this is the case, you will need to ask your site administrator to make your assets live.



Part 2 - Safe Edit

2. From the **Details** screen of the Training page, click on the **Initiate safe edit** button. Any changes you now make to the content will not be visible to the public.



Part 3 - To Publish changes

1. Return to the **Details** screen of the Training page.
   Drop down **Changes ?** and select **Approve**. Click **Save**. The status of the asset will change to **Safe Edit Approved To Go Live**.
   Drop down the Changes field again, select **Make Live** and Save.

   Or to cancel the changes, return to the details screen, drop down **Changes ?** and select **Cancel Safe Edit**.

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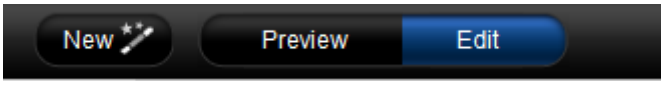
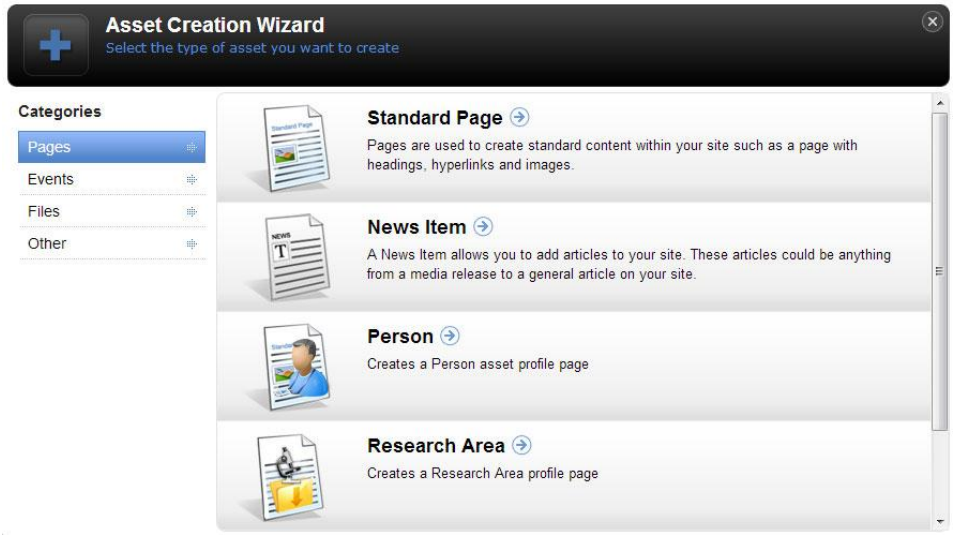
Workshop 5 Creating People Assets

Add a Person

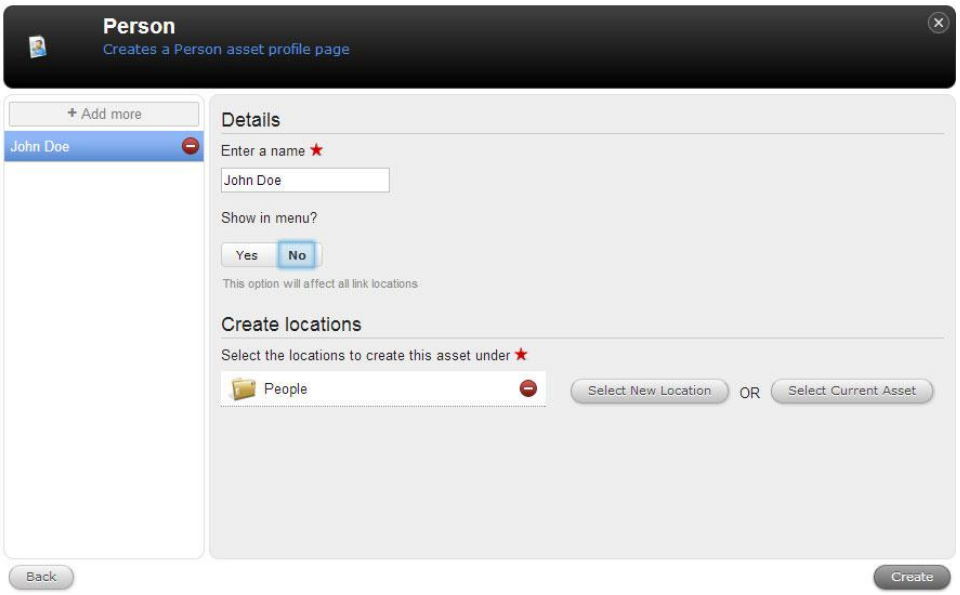
8. On the EES **Top Task bar** select **New**.



9. The **Asset Creation Wizard** will appear. **Select** the Category **Pages**, and then select **Person**.

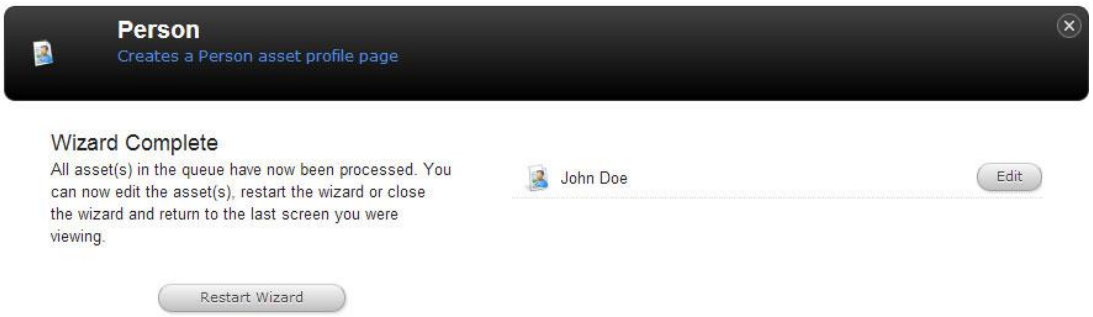

Asset Creation Wizard
Select the type of asset you want to create
Categories
Pages
Events
Files
Other
Standard Page
Pages are used to create standard content within your site such as a page with headings, hyperlinks and images.
News Item
A News Item allows you to add articles to your site. These articles could be anything from a media release to a general article on your site.
Person
Creates a Person asset profile page
Research Area
Creates a Research Area profile page

10. The **Create Person Wizard** will open:
    - Enter the name of the Person (first then last name)
    - Set **Show in Menu** to **No**
    - Select **New Location** – using the **Asset** Finder screen highlight the **People** folder and click on **Select**
    - Click on the **Create** button to complete the process

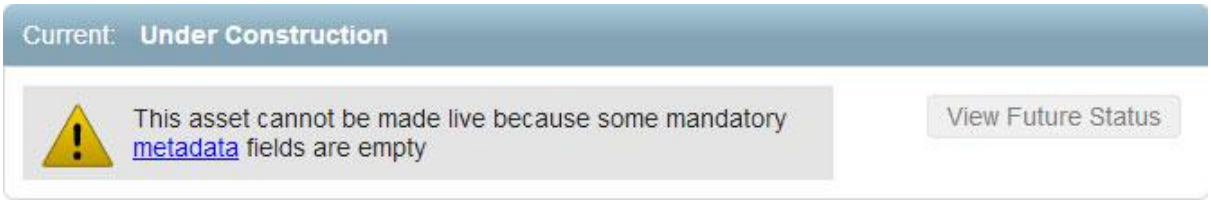


11. The asset has now been created. The options available are:

- Close the wizard - which will return you to the last screen you were viewing
- Restart the wizard - to create another asset
- Edit - to start editing this asset


Person
Creates a Person asset profile page
Wizard Complete
All asset(s) in the queue have now been processed. You can now edit the asset(s), restart the wizard or close the wizard and return to the last screen you were viewing.
John Doe
Edit
Restart Wizard

12. Select **Edit 'John Doe'**.
13. On the details screen you will notice the warning message advising the asset cannot be made Live because some mandatory metadata fields are empty.

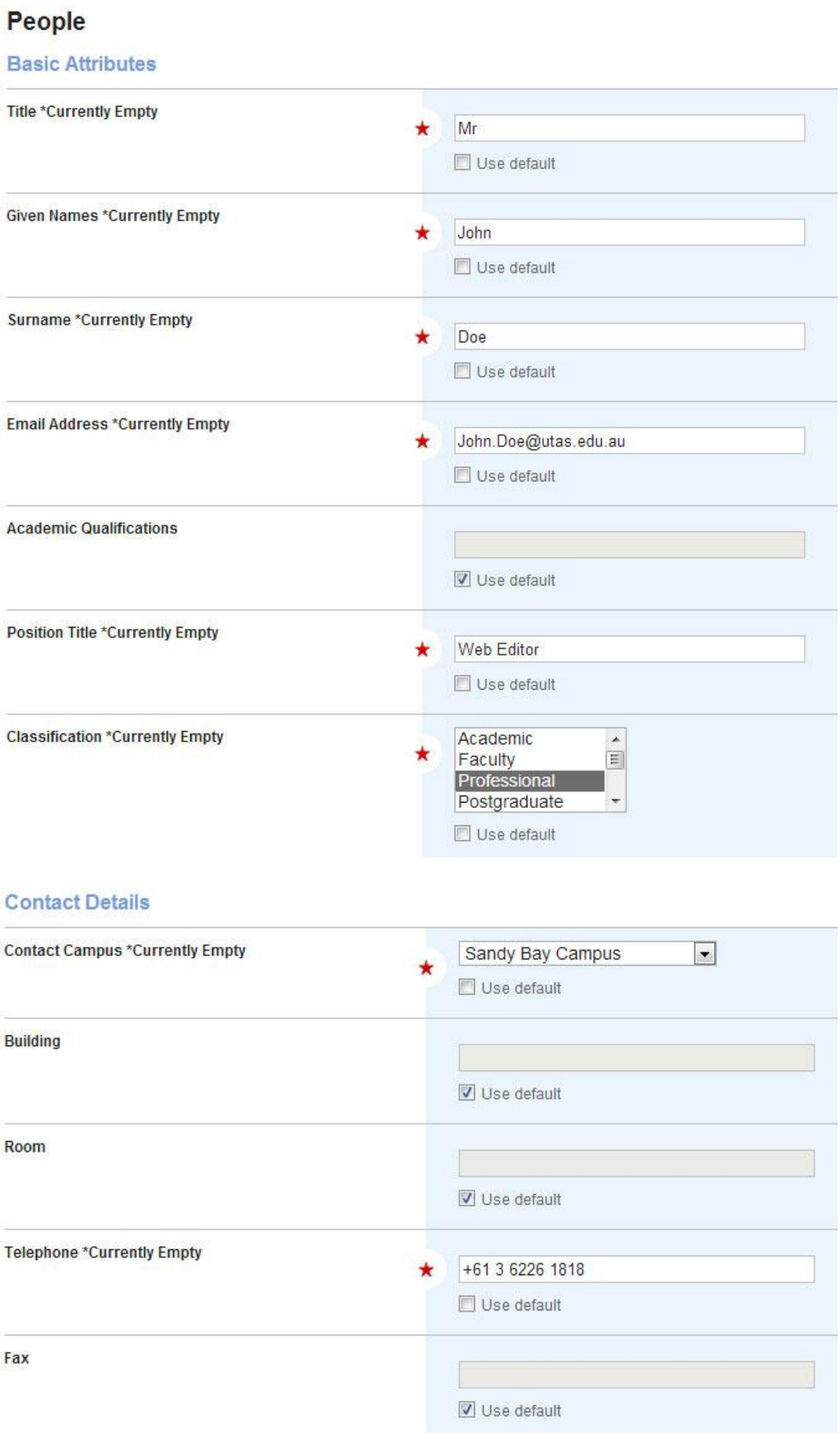

Current: Under Construction
This asset cannot be made live because some mandatory metadata fields are empty
View Future Status

14. Select the **Metadata** tab.

15. Scroll down to the **People** metadata area and enter the relevant information. The mandatory fields are listed under **Basic Attributes** and **Contact Details** and are signified by the red stars.

    Note: To enter details into these fields you must uncheck the **Use Default** boxes.

    Once complete click **Save**.


People
Basic Attributes
Title *Currently Empty
Mr
Use default
Given Names *Currently Empty
John
Use default
Surname *Currently Empty
Doe
Use default
Email Address *Currently Empty
John.Doe@utas.edu.au
Use default
Academic Qualifications
Use default
Position Title *Currently Empty
Web Editor
Use default
Classification *Currently Empty
Academic
Faculty
Professional
Postgraduate
Use default
Contact Details
Contact Campus *Currently Empty
Sandy Bay Campus
Use default
Building
Use default
Room
Use default
Telephone *Currently Empty
+61 3 6226 1818
Use default
Fax
Use default

Add a Person Image

16. To add an image – under the **Related Image** section of the **Details** screen, click on select.
    - Using the **Asset** Finder find the **People** Images folder, highlight the relevant image and click on **Select**

17. The person asset can now be made live. On the **Details** screen use the **Change?** Drop down box and select **Approve and Make Live**.

18. Use the asset finder to open up the person asset. On the details screen you will notice that the warning message is no longer visible. The **Person** can now be made **Live**. On the **Details** screen use the **Change?** Drop down box and select **Approve and Make Live**.

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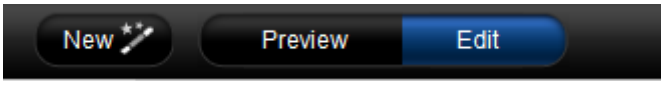
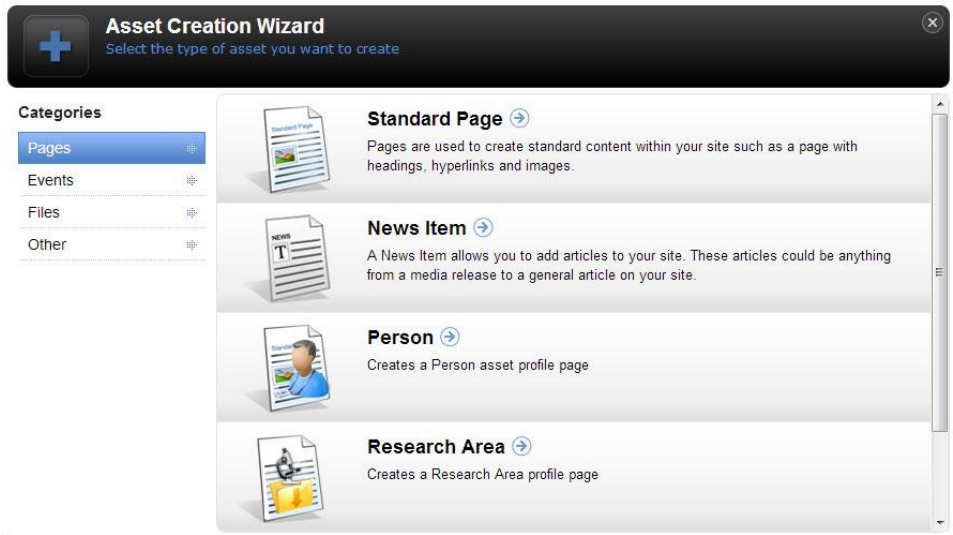
Workshop 7: Creating Research Area and Research Project Assets

Research Area

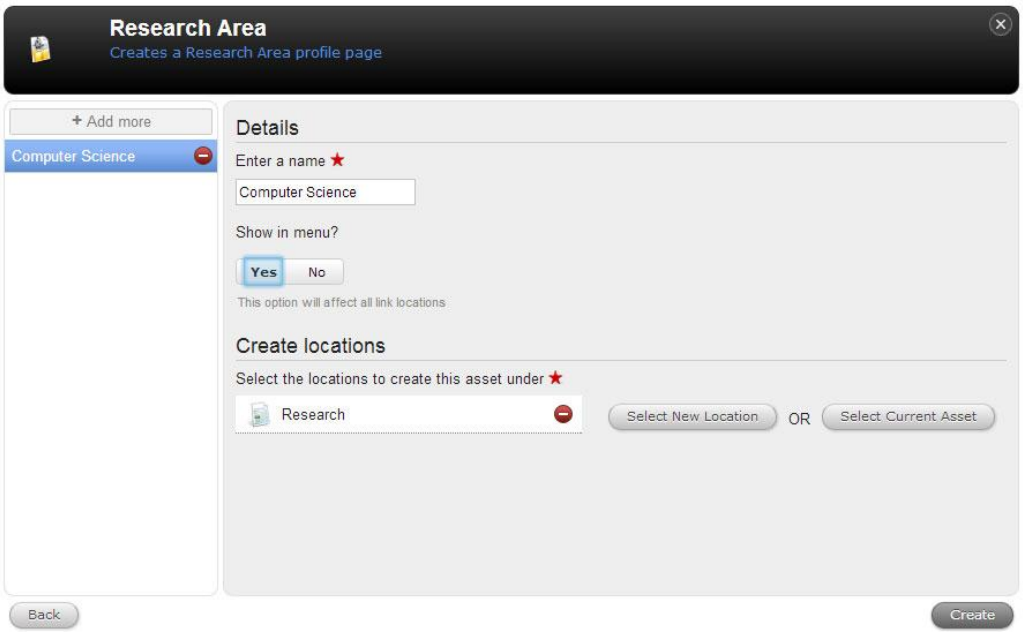
19. On the EES **Top Task bar** select **New**.



20. The **Asset Creation Wizard** will appear. **Select** the Category **Pages**, and then select **Research Area**.

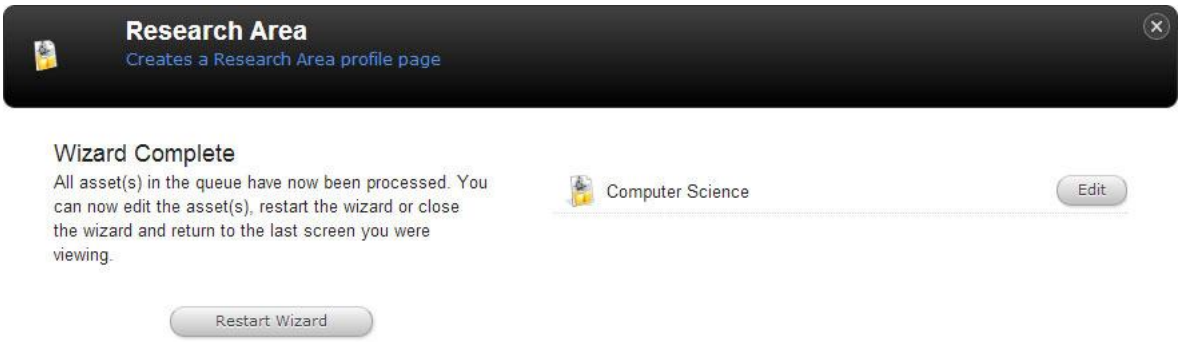

Asset Creation Wizard
Select the type of asset you want to create
Categories
Pages
Events
Files
Other
Standard Page
Pages are used to create standard content within your site such as a page with headings, hyperlinks and images.
News Item
A News Item allows you to add articles to your site. These articles could be anything from a media release to a general article on your site.
Person
Creates a Person asset profile page
Research Area
Creates a Research Area profile page

21. The **Create Research Area Wizard** will open:
    - Enter the name of the **Research Area**.
    - Set **Show in Menu** to **Yes**
    - Select **New Location** – using the **Asset** Finder screen highlight **Research** assets and click on **Select**
    - Click on the **Create** button to complete the process



© University of Tasmania, August 2013

22. The asset has now been created. The options available are:
    - Close the wizard - which will return you to the last screen you were viewing
    - Restart the wizard - to create another asset
    - Edit - to start editing this asset


Research Area
Creates a Research Area profile page
Wizard Complete
All asset(s) in the queue have now been processed. You can now edit the asset(s), restart the wizard or close the wizard and return to the last screen you were viewing.
Computer Science
Edit
Restart Wizard

23. Select **Edit 'Research Area'**.

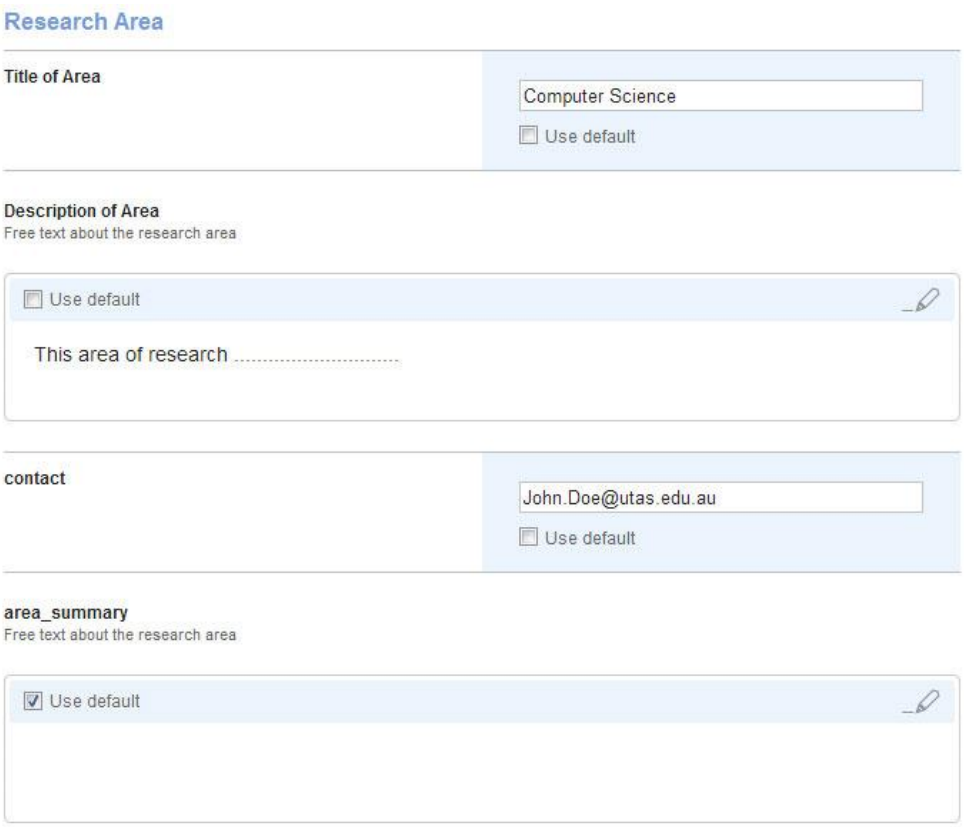
24. On the details screen you will notice the warning message advising the asset cannot be made Live because some mandatory metadata fields are empty. Click on the **Metadata** hyperlink contained in the warning message;

Current: Under Construction
This asset cannot be made live because some mandatory metadata fields are empty
View Future Status

Or select the **Metadata** tab;

25. Enter the relevant information into the required fields, remembering to uncheck the **Use Default** boxes.

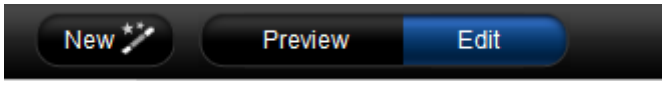
    Once complete click **Save**.



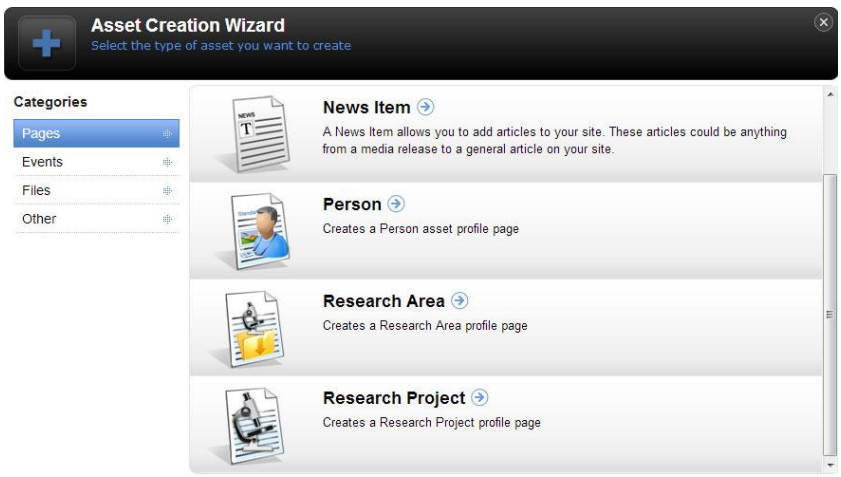
26. Return to the **Details** tab, the **Research Area** can now be made **Live**. On the **Details** screen use the **Change?** Drop down box and select **Approve and Make Live**.

Research Project

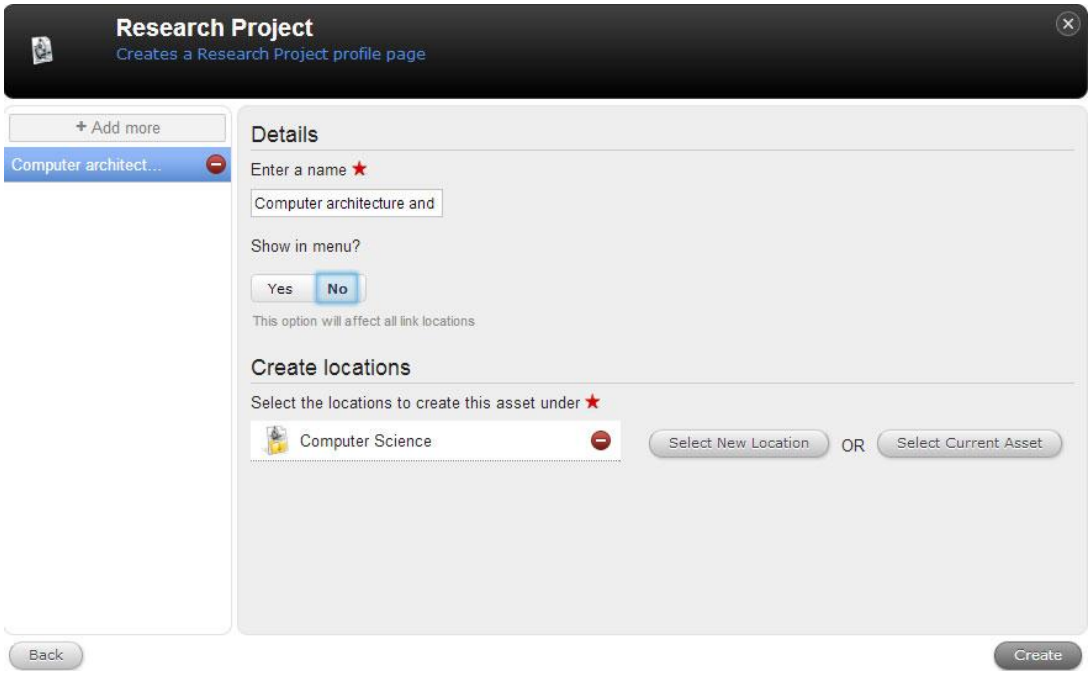
1. On the EES **Top Task bar** select **New**.



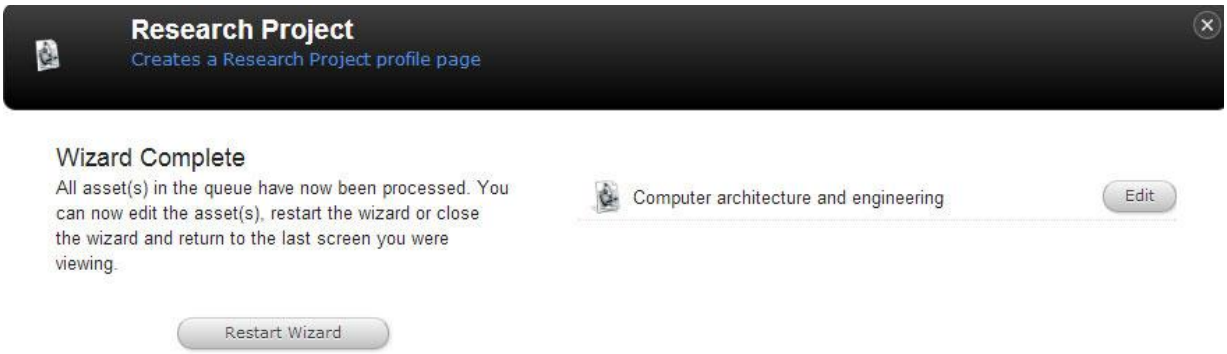
2. The **Asset Creation Wizard** will appear. **Select** the Category **Pages**, and then select **Research Project**.


Asset Creation Wizard
Select the type of asset you want to create
Categories
Pages
Events
Files
Other
News Item
A News Item allows you to add articles to your site. These articles could be anything from a media release to a general article on your site.
Person
Creates a Person asset profile page
Research Area
Creates a Research Area profile page
Research Project
Creates a Research Project profile page

3. The **Create Research Project Wizard** will open:
    - Enter the name of the **Research Project**
    - Set **Show in Menu** to **Yes**
    - Select **New Location** – using the **Asset** Finder screen highlight the appropriate **Research Area** asset and click on **Select**
    - Click on the **Create** button to complete the process



4. The asset has now been created. The options available are:
    - Close the wizard - which will return you to the last screen you were viewing
    - Restart the wizard - to create another asset
    - Edit - to start editing this asset


Research Project
Creates a Research Project profile page
Wizard Complete
All asset(s) in the queue have now been processed. You can now edit the asset(s), restart the wizard or close the wizard and return to the last screen you were viewing.
Computer architecture and engineering
Edit
Restart Wizard

5. Select **Edit 'Research Project'**.

6. Select the **Metadata** tab.

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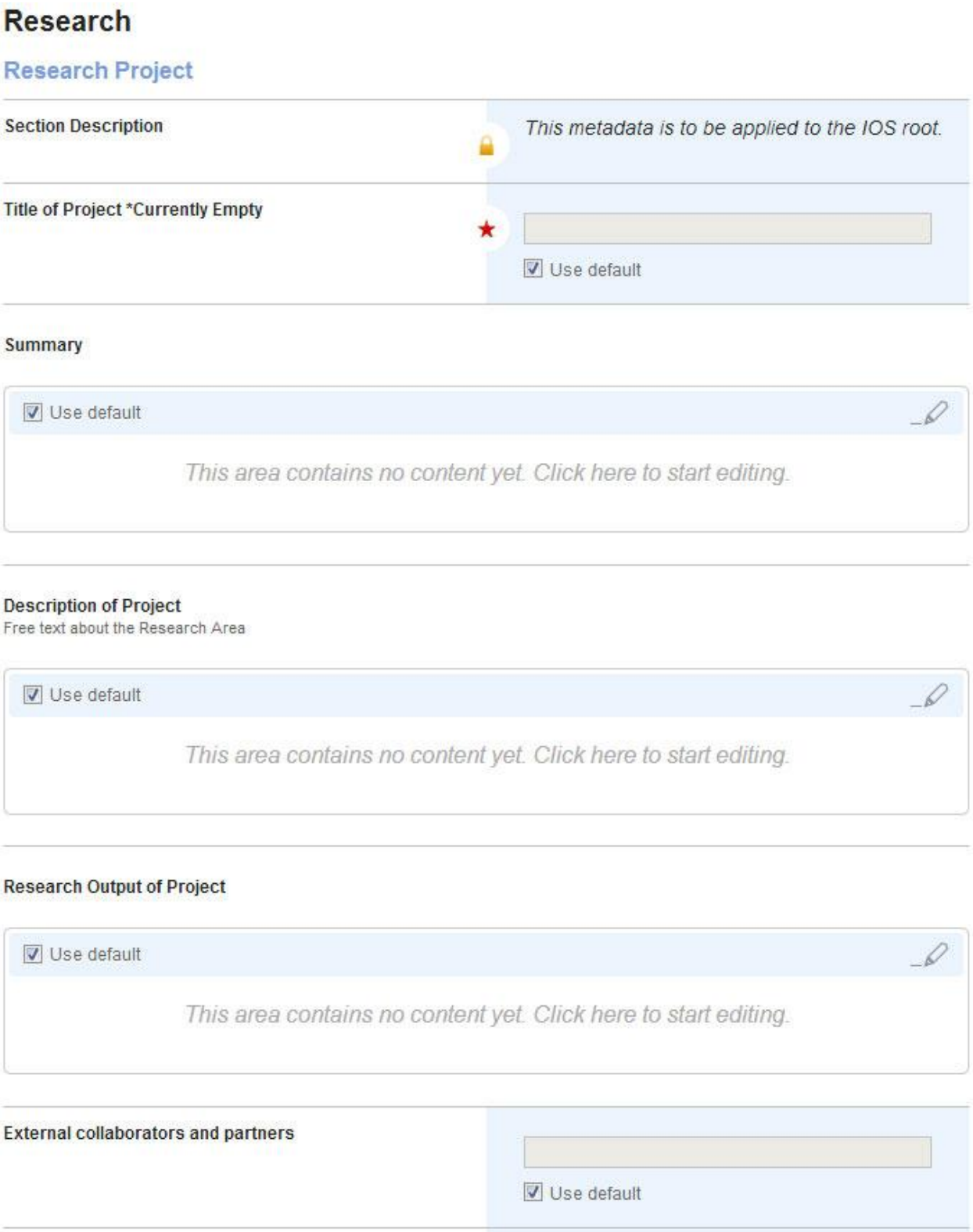
7. Enter the relevant information into the required fields, remembering to uncheck the Use Default boxes.


Research
Research Project
Section Description
This metadata is to be applied to the IOS root.
Title of Project *Currently Empty
Use default
Summary
Use default
This area contains no content yet. Click here to start editing.
Description of Project
Free text about the Research Area
Use default
This area contains no content yet. Click here to start editing.
Research Output of Project
Use default
This area contains no content yet. Click here to start editing.
External collaborators and partners
Use default

Once completed click **Save**.

8. Return to the **Details** tab, the **Research Project** can now be made **Live**. On the **Details** screen use the **Change?** Drop down box and select **Approve and Make Live**.

Workshop 7: Common Questions

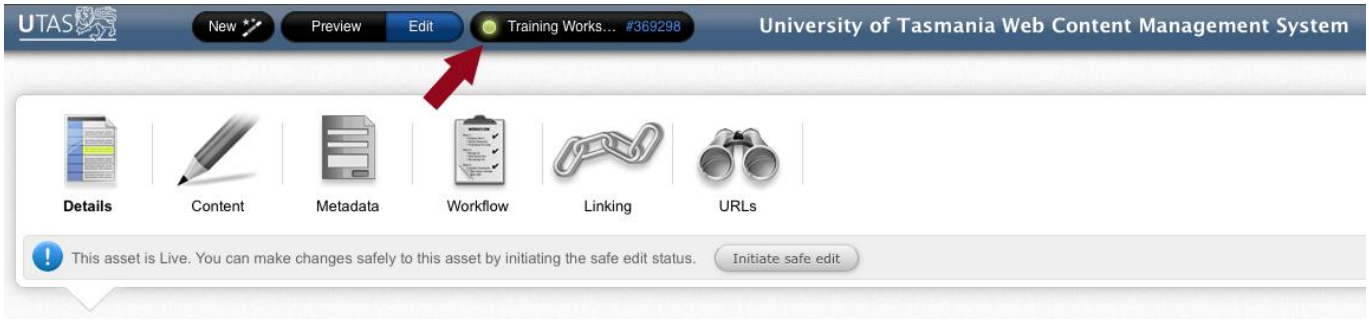
What is an asset?
An asset is any page/ image file/ document or other object.

What is a lock?
A lock is applied to any asset that you open in edit mode. A lock prevents another user from making changes to the asset whilst you are doing so. A lock will automatically be released after ten minutes of inactivity.

Why is my image not appearing on the live page?
Check to see if the image is **Live**. If it is still '**Under construction**' it will not be visible to the public.

Can I edit a page, without letting the public see my changes?
Yes, you can. You can do this by initiating safe edit mode. This allows you to edit your page without the public seeing any of the changes. To do this:

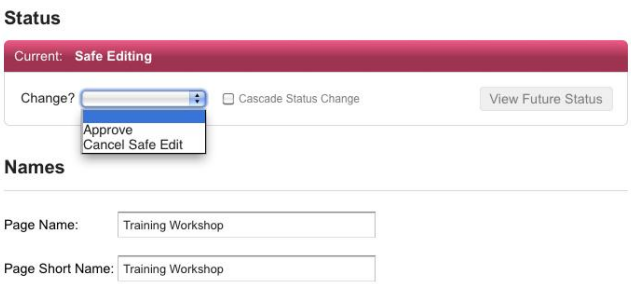
1. Navigate to page that is to be modified
2. Select the **Details** or **Contents** icons
3. Select **Initiate safe edit**

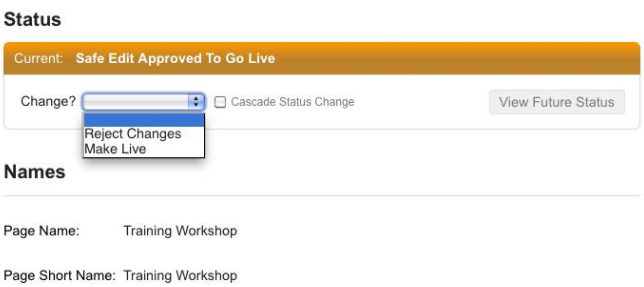


4. The status of the asset is visible on the top menu to the right of the Edit button.

5. Make your changes. When you are finished editing and are happy with the preview go to the details screen and choose **Approve** from the dropdown options and **Save** (top right hand corner).

6. The status of the asset will be **Safe Edit Approved to go Live**. Select **Make Live** from the dropdown options and save. The asset will now be live with the changes you have made visible to the public.





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7. If you do not wish to keep the changes choose “Cancel Safe Edit” from the dropdown options and save. The asset will now be live, without any changes.

Why are there double brackets around my page title?
You will see double brackets only if you are logged into EES. The double brackets mean that the page is still under construction i.e. it is not live and therefore not visible to the public.

Why is my edited content not showing up in the live site?
The most common reason that you will not see changes on your live site once editing is completed is due to the matrix cache.

Matrix cache gets cleared every 3 hours - so your content may not be visible for up to 3 hours. If after this time the content is still not appearing, it may be due to the cache on your computer- press Control F5 to clear the cache.
If you require the information to be available instantly contact Web services and they can do this for you.

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Workshop 8: Accessibility Auditor

Note: The content in this part of the manual is based on content from Squiz Matrix's online Manual. For further details visit: http://manuals.matrix.squizsuite.net/edit-plus/chapters/accessibility-auditor

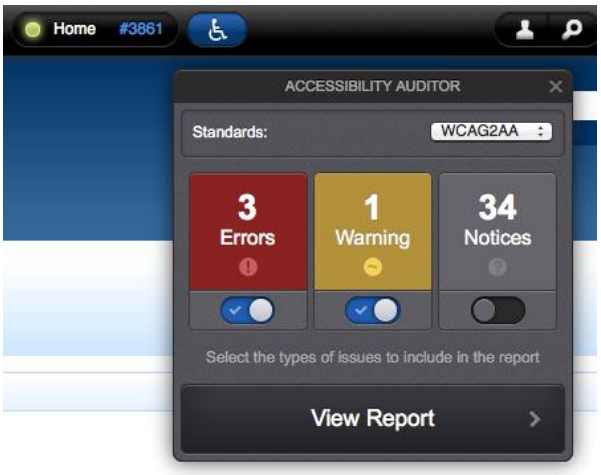
The **Accessibility Auditor** tool runs an audit against the content of assets within your site, evaluating and detailing any existing or potential accessibility issues, in accordance with WCAG 2.0 standards.

The **Accessibility Auditor's** comprehensive reporting of issues allows you to address and resolve errors and warnings, providing accessible content for your users -- as defined by the World Wide Web Consortium (W3C)'s Web Content Accessibility Guidelines (WCAG) -- and to ensure all content is accessible to a wider range of people with disabilities.

Part 1: Accessing the Accessibility Auditor

When in *Preview Mode*, the **Accessibility Auditor** will evaluate the accessibility of the content of the currently viewed page. To access the **Accessibility Auditor**, click on the *Show Accessibility Auditor* button, located to the right of the *Mode Switcher* in the *Edit+ for Squiz Matrix* tool bar, as shown in the figure below.

Clicking this button will display the **Accessibility Auditor** pop-up, which will evaluate the content of the page and display a summary outlining any issues, as shown in the figure below (left).



When in *Edit Mode*, the **Accessibility Auditor** can be accessed via the *Content Editor* to evaluate the accessibility of the content of a specific *Content Container*. To access the **Accessibility Auditor**, click on the *Accessibility Auditor* icon; the *Accessibility Auditor* pop-up will appear, displaying a summary of the issues discovered, as shown in the figure above right.

Note: The **Accessibility Auditor**, when used within *Edit Mode*, **will only audit the content of the selected *Content Container*** and not all content on the asset.

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Part 2: The Accessibility Report

When the **Accessibility Auditor** is first accessed, it will evaluate the content of your asset and provide a report on the following three categories of issues:

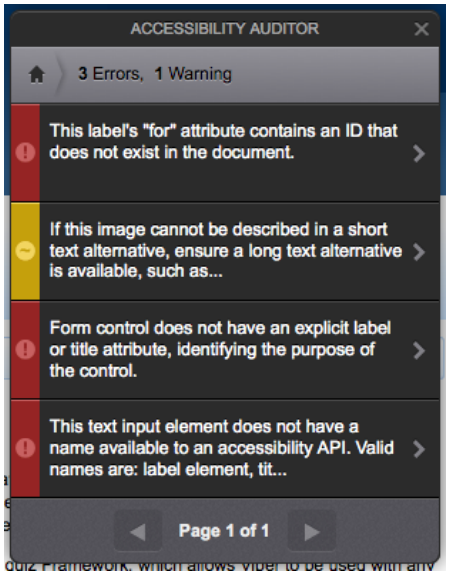
- **Errors**: these issues must be addressed to meet the accessibility standards
- **Warnings**: these issues should be addressed to meet the accessibility standards (best practice)
- **Notices**: these issues require manual checking and may need to be addressed to meet the accessibility standards

You can modify the standard against which accessibility is audited upon in the **Standard***s* field, selecting either **A**, **AA** or **AAA** WCAG 2.0 standards.

By default, the **Accessibility Auditor** will initially check against **WCAG2AA** standards.

Click the **View Report** button to provide a report of the issues found within the audited content, as shown in the figure below.

You can specify which categories of issues to include in the accessibility report using the toggles available, below each issue notice. So, for example, you could choose to include only **Errors** within the accessibility report, or you could choose to include both **Errors** and **Warnings**.


ACCESSIBILITY AUDITOR
3 Errors, 1 Warning
This label's "for" attribute contains an ID that does not exist in the document.
If this image cannot be described in a short text alternative, ensure a long text alternative is available, such as...
Form control does not have an explicit label or title attribute, identifying the purpose of the control.
This text input element does not have a name available to an accessibility API. Valid names are: label element, tit...
Page 1 of 1

The accessibility report will be displayed as a list of existing accessibility issues, identified by their category colour.

Clicking on an issue will provide a report of the individual issue, outlining the *Principle* and *Technique* that the issue addresses within the WCAG 2.0 standards, as shown in the figure below. Clicking on these links will direct you to the appropriate WCAG 2.0 documentation.

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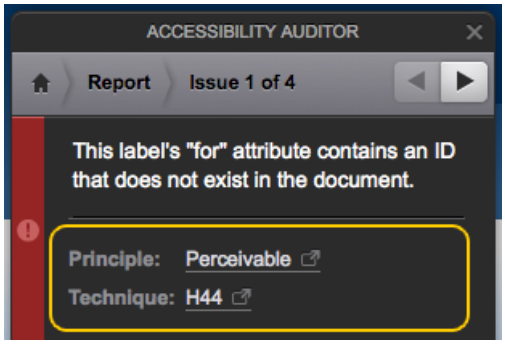
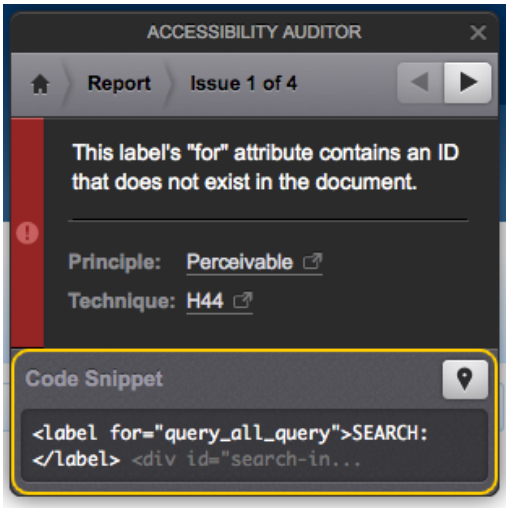

ACCESSIBILITY AUDITOR
Report
Issue 1 of 4
This label's "for" attribute contains an ID that does not exist in the document.
Principle: Perceivable
Technique: H44

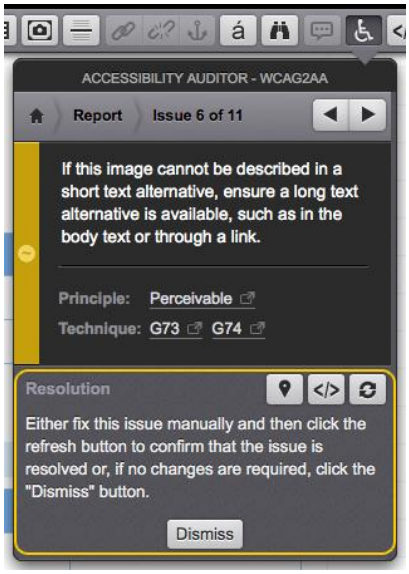


When using the **Accessibility Auditor** tool within **Preview Mode**, each individual issue report will include a *Code Snippet* section displaying the section of code that the issue applies to, as shown in the figure above right.

Clicking the **Point to Element** button in this section will display an icon pointing to the relevant element within the content of the page. Please note that in some cases, the *Point to Element* button will not be available as the relevant element may be hidden on the page.

Part 3: Resolving and Dismissing Issues

When auditing the accessibility of content within *Edit Mode*, each issue report will include a *Resolution* section detailing the steps to resolving the relevant issue, as shown in the figure below.


ACCESSIBILITY AUDITOR - WCAG2AA
Report
Issue 6 of 11
If this image cannot be described in a short text alternative, ensure a long text alternative is available, such as in the body text or through a link.
Principle: Perceivable
Technique: G73 G74
Resolution
Either fix this issue manually and then click the refresh button to confirm that the issue is resolved or, if no changes are required, click the "Dismiss" button.
Dismiss

Clicking the *Point to Element* button in this section will display an icon pointing to the relevant element within the content of the *Content Container*. Please note that, in some cases, the *Point to Element* button will not be available as the relevant element may be hidden on the container.

The *Show in Source View* button will display the *Source Editor* of the *Content Container*, highlighting the section of code that the issue applies to and allowing you to edit and apply changes to the code.

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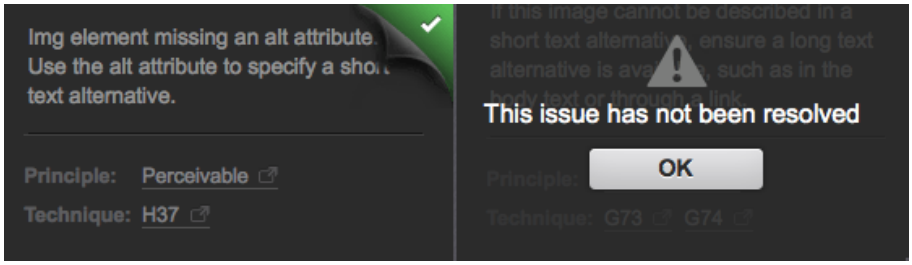
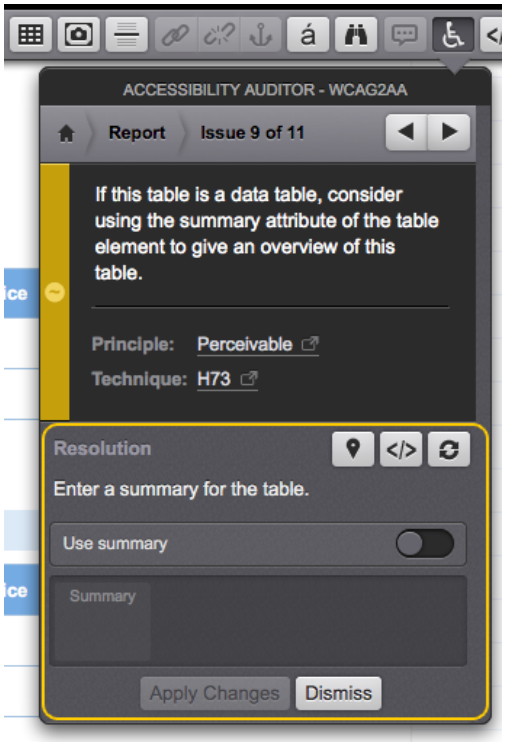
The *Refresh Issue* button will refresh the issue in the *Accessibility Auditor*. This is useful if you have made changes to fix a particular issue and want to check whether it has been resolved. If the issue has been resolved, the issue will be marked with a tick; if it has not, an error message will be displayed, as shown in the figure below.



In some cases, additional fields may be available allowing you to resolve issues within the *Accessibility Auditor*, for example, adding a summary for a table, as shown in the figure below left.


ACCESSIBILITY AUDITOR - WCAG2AA
Report
Issue 9 of 11
If this table is a data table, consider using the summary attribute of the table element to give an overview of this table.
Principle: Perceivable
Technique: H73
Resolution
Enter a summary for the table.
Use summary
Summary
Apply Changes
Dismiss

Technique: G73 G74
Resolution
Either fix this issue manually and then click the refresh button to confirm that the issue is resolved or, if no changes are required, click the "Dismiss" button.
Dismiss

Use the available fields to address the issue and click the *Apply Changes* button. If the issue has been resolved, it will be marked with a tick.

You can dismiss individual *Warning* and *Notice* issues by clicking the *Dismiss* button at the bottom of the *Accessibility Auditor*, as shown in the figure above right.

Please note that as *Error* issues require mandatory resolution, in accordance with WCAG 2.0 standards, these issues cannot be dismissed.

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Workshop 9: Further Editing Techniques

UTAS Classes

Classes are global styles which are used across all UWCMS sites. They help increase the uniformity of UTAS sites and are an easy way for editors to improve web page layout and visual appeal.

IMAGES

- **img-l** – positions image to the left of the page, text wraps to the right
- **img-r** – positions images to the right of the page, text wraps to the left
- **img-border** – adds a border and padding around the image (remove '0' on border thickness)

TABLES

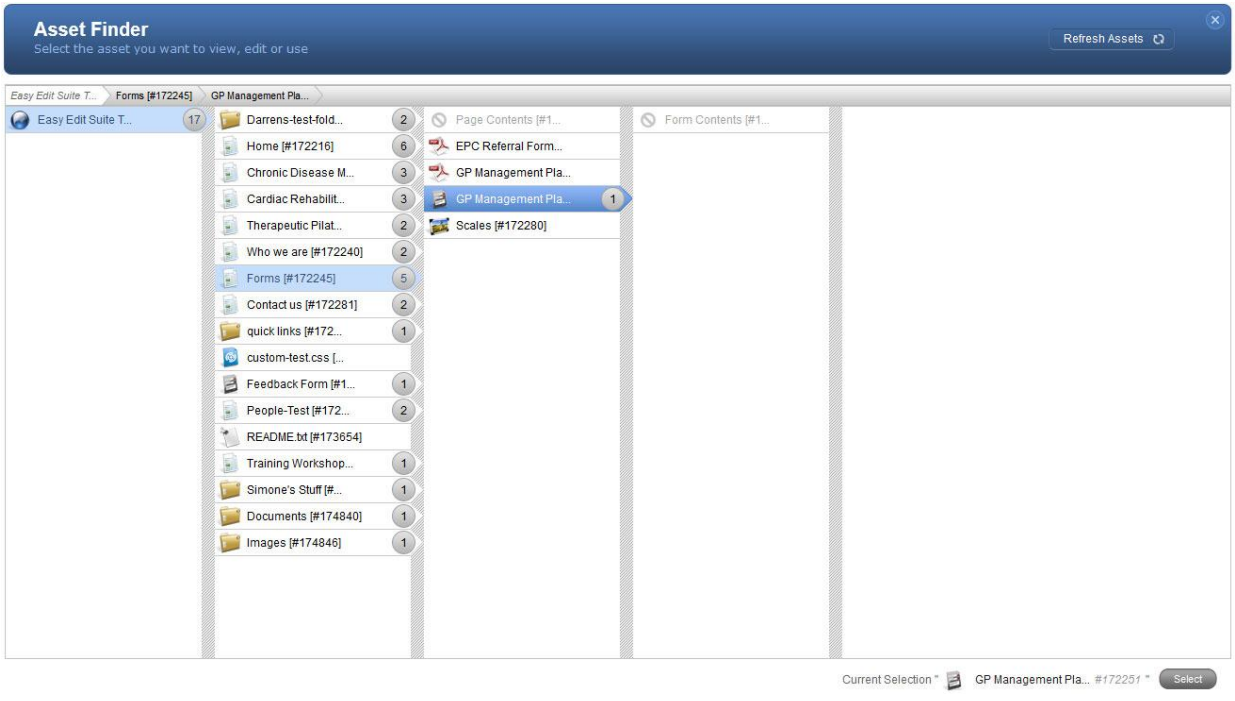
- **row-border** – background colour and border between rows
- **col-border** – background colour and border between columns
- **alt_rows** – alternates row background colour and hover effect

PARAGRAPH

- **intro** – larger text for intro paragraphs
- **note information** – green background, full width
- **note notice** – red background, full width
- **note general** – blue background, full width

How to search for an asset

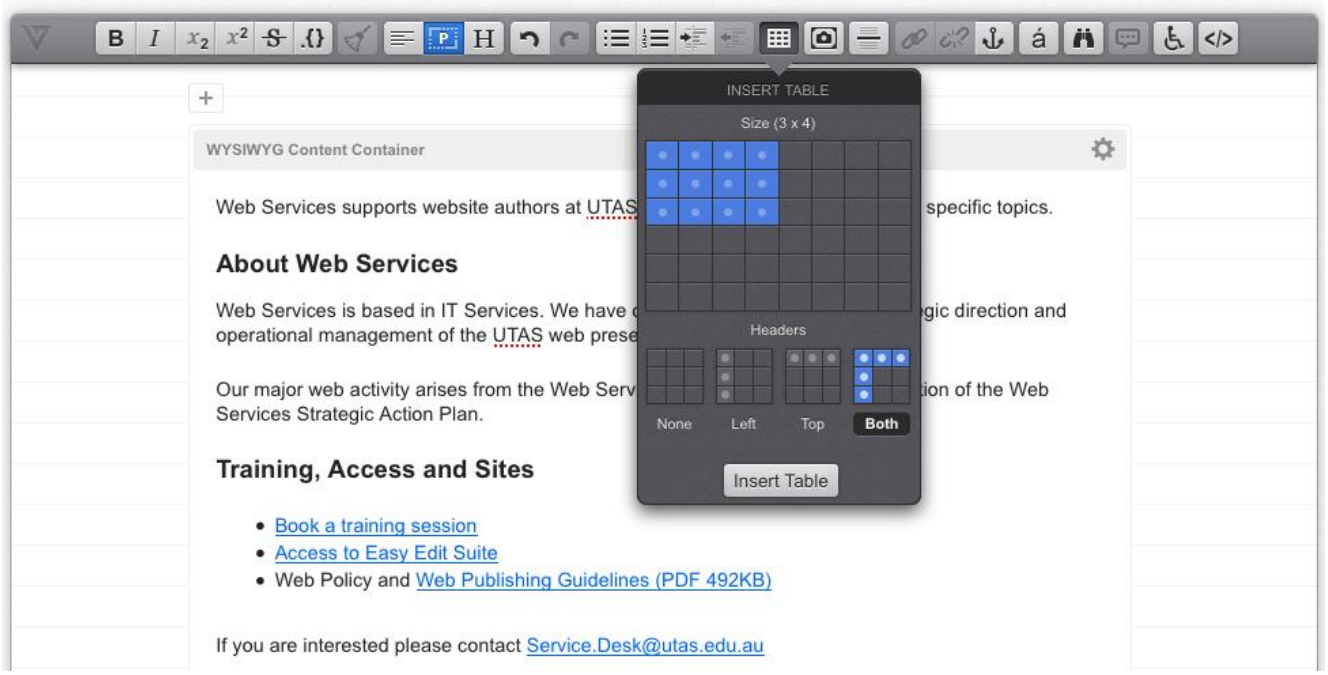
1. Click on the **Search** icon located on the **Top Task Bar** (top right hand corner)
2. The **Asset Finder** screen will appear, each asset displays the number of child assets it has. Select the asset you require by drilling down the tree and selecting the parent asset. In the example below **Forms** has five children – in order to view and select **GP Management Plan** you need to first select **Forms.**



3. The **Details** screen of the asset will appear.

How to Add a Table

1. To add a table within your document press the **Insert Table** icon
2. The Insert Table popup will appear.


INSERT TABLE
Size (3 x 4)
Headers
None
Left
Top
Both
Insert Table
WYSIWYG Content Container
Web Services supports website authors at UTAS
specific topics.
About Web Services
Web Services is based in IT Services. We have
gic direction and
operational management of the UTAS web prese
Our major web activity arises from the Web Serv
ion of the Web
Services Strategic Action Plan.
Training, Access and Sites
Book a training session
Access to Easy Edit Suite
Web Policy and Web Publishing Guidelines (PDF 492KB)
If you are interested please contact Service.Desk@utas.edu.au

3. Add the number of columns and rows that are required. In this case we are adding 4 columns and 3 rows. Click on the row or cell to add or remove the number of cells/rows.

4. Now using the **Headers** section below, select if you want the first row or the first column to be the table header, or you need other as headers. In this case we require both.

5. Click **Insert Table**.

Easy Edit Suite Training Dates	Monday	Tuesday	Thursday
Morning	10.00am - 12 noon		10.00am - 12 noon
Afternoon		1.30pm - 3.30pm	

6. Fill in the headings and all of the cellular data. Please see the figure above as an example.
7. To add a class to your table select the whole table and click the **Add Class** icon .

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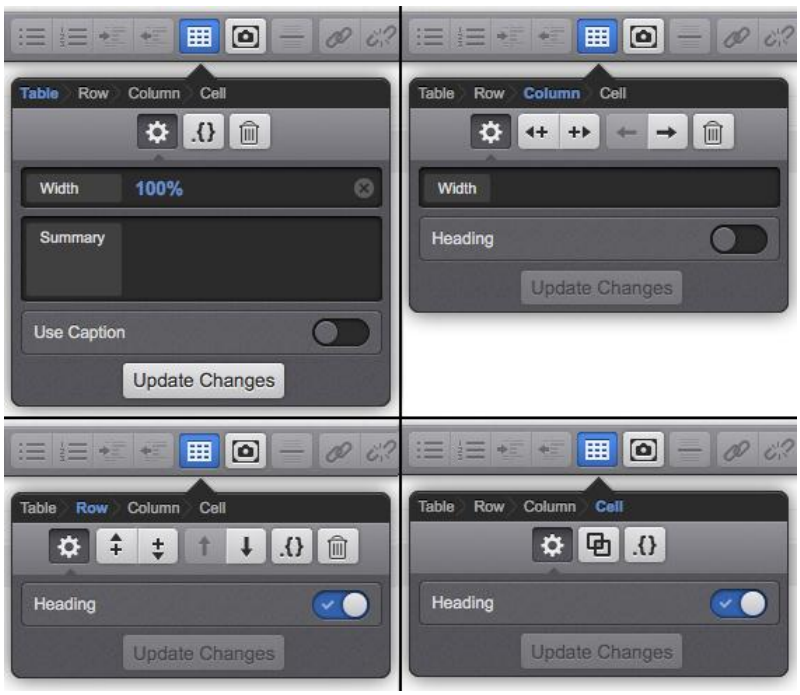
8. Type in the classes *col-border (or row-border) and alt_cols.*
9. Click **Update Changes** and **Save.**
10. Preview your table.

How to Edit a Table

1. Once a table has been inserted, you can modify its settings by selecting/clicking on the table within the *Content Container* and clicking the *Insert Table* button; you will be able to select to modify either the entire table, or the selected row, column or cell. The **Table Properties icon** will now be available in the WYSIWYG toolbar. Select this icon . [1] Below are screen shots of the various ways to edit your table using **Table Properties**.



[1] This text and figure below are from Squiz Matrix Manual (http://manuals.matrix.squizsuite.net/edit-plus/chapters/viper - creating-editing-and-maintaining-tables)

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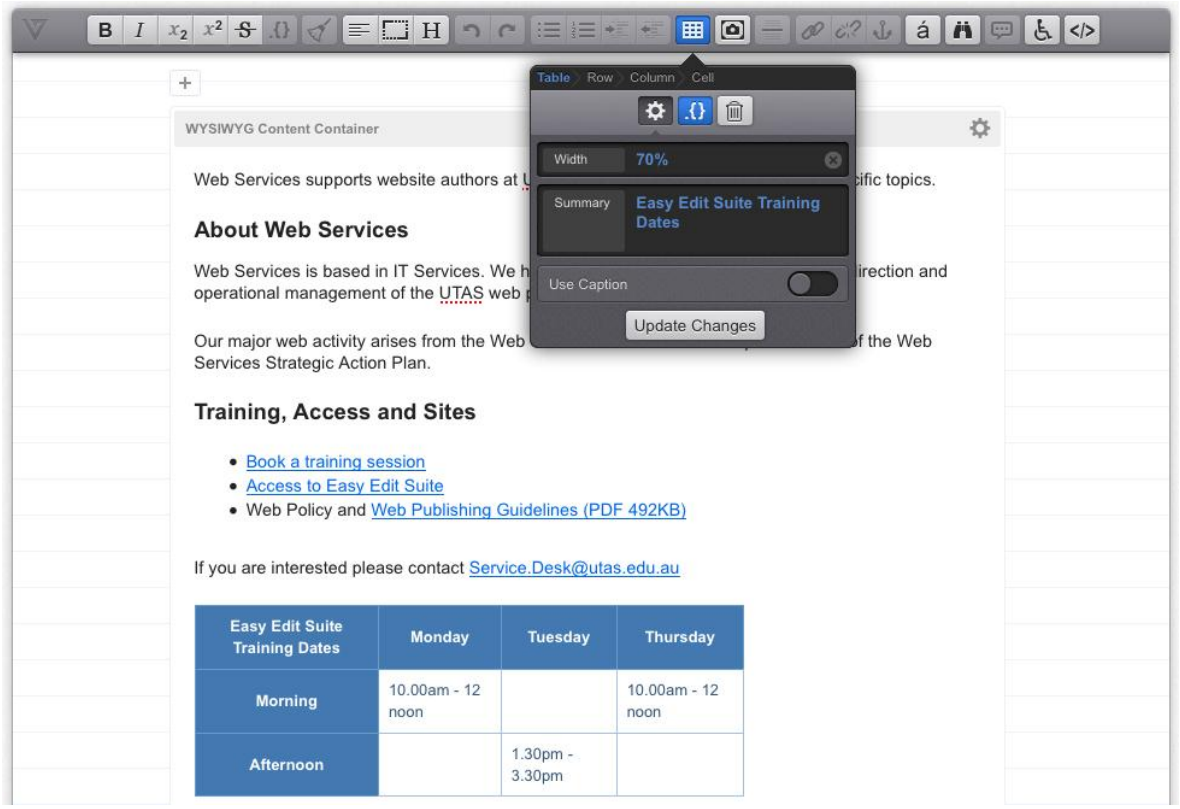
2. **For Example:** If you want to edit the width of the table or a column, select the table of the column and then click on the *Insert Table* icon.

3. Add the required width (eg. 70%) and a **Summary** for the table. Click **Update Changes** and **Save**.



To insert row:

a. In the table select the row above where you want to add the new row
b. Select the *Insert Table* icon and choose the **Show Row Tools** option

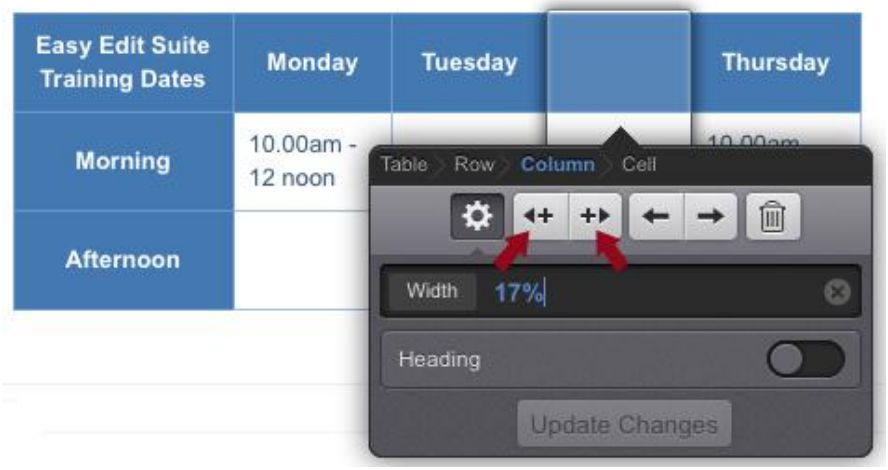
c. Using the **Insert Row After icon** shown below, add a new row below

d. Alternatively to delete a row use the Trash Can icon or to move a row elsewhere within the table, use the upward or downward arrow icons
e. Click **Update Changes** and **Save**

To insert column:

a. Select the column where you want to add the new row before or after
b. Select the *Insert Table* icon and choose the **Show Column Tools** option

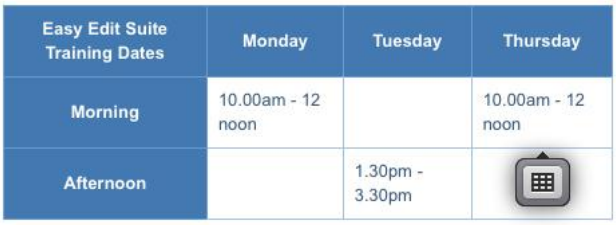
c. When the Column Tools popup appears, choose either **Insert Column Before** or **Insert Column After**. You can also specify the width of the column. **Update Changes** and **Save**



d. Alternatively to delete a column, use the Trash Can icon or to move a column elsewhere within the table, use the **Move Left** and **Move Right** icons

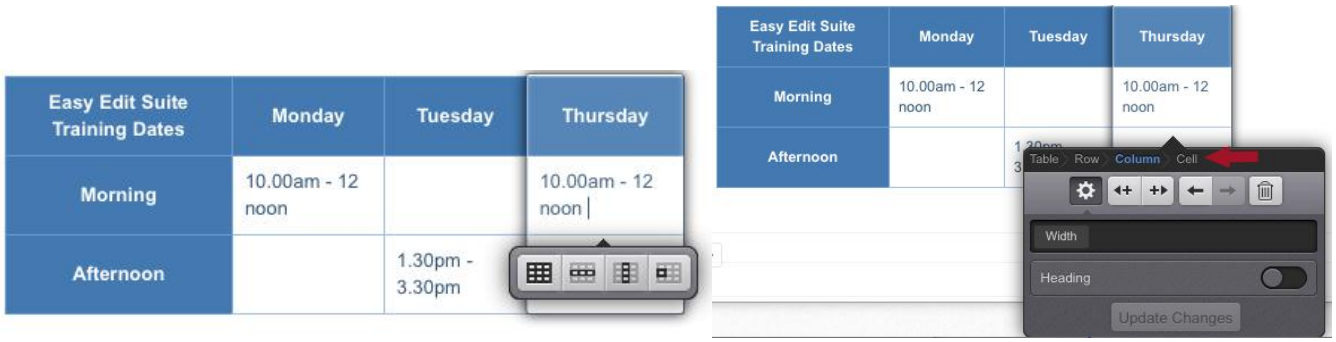
To merge cells:

a. Click on one of the cells you wish to merge

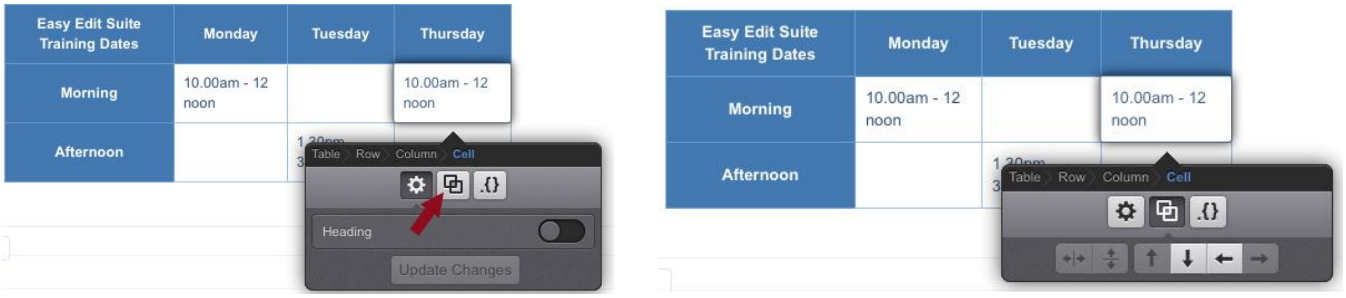


b. Click on the Insert Table icon shown above, the Show Row/Column option will appear

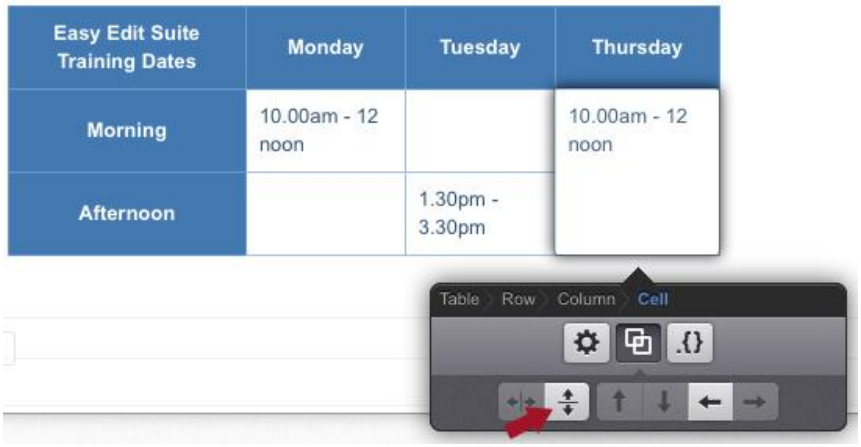
c. Select whichever option you wish to merge, i.e., row or column



d. Click on the Cell option (the last item at the top of the column popup indicated by the red arrow in the figure above)



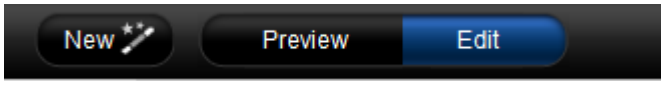
e. Select the **Toggle Merge/Split Options** button as indicated in the figure above
f. Use either the **Merge Down** or **Merge Left** buttons to create the required merge
g. Now you can also split these merged cells using the options Split Horizontally option shown below



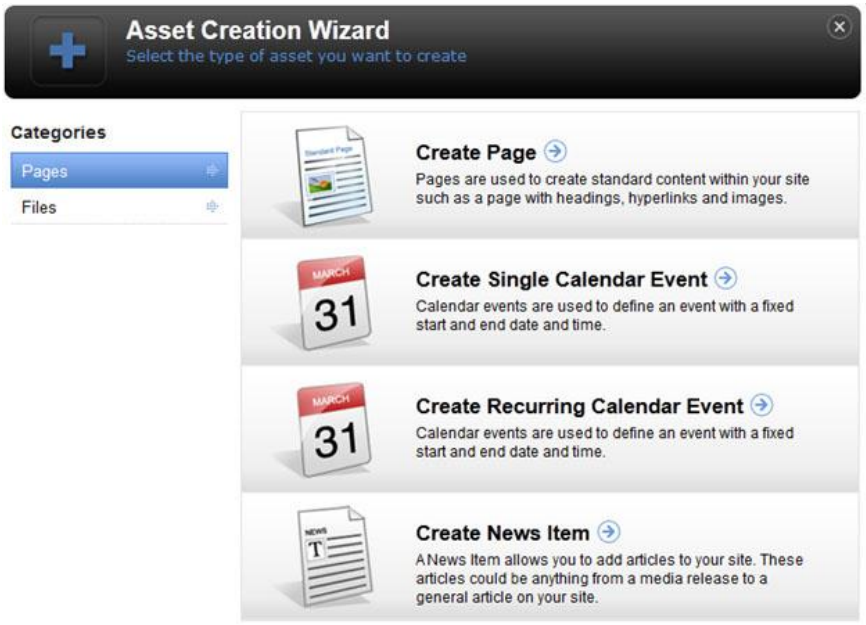
h. **Save** your changes

How to add a News Item

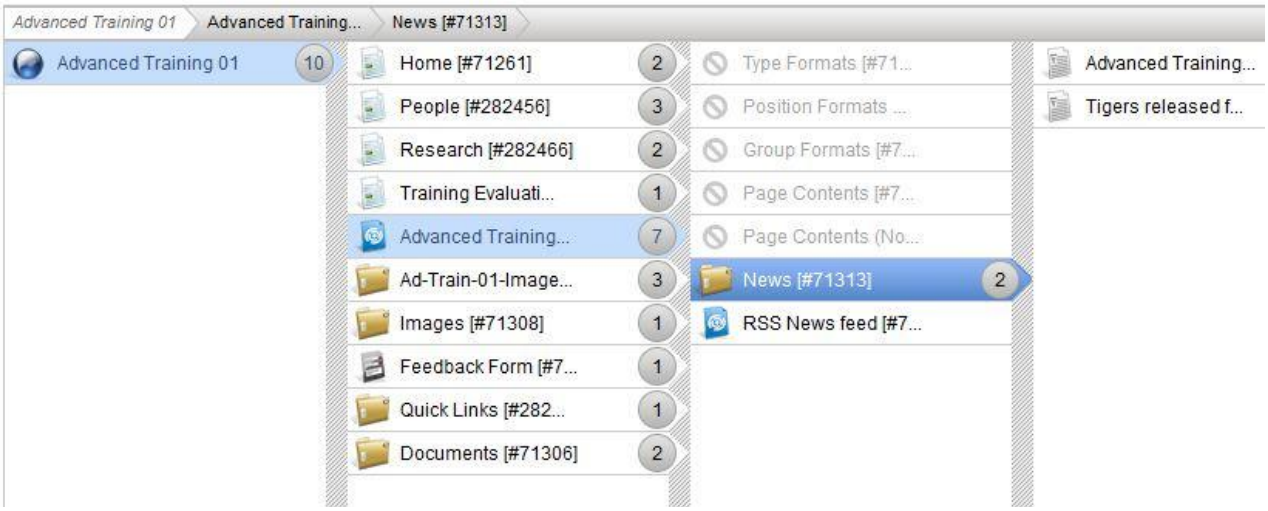
1. On the EES **Top Task Bar** select **New**.



2. The **Asset Creation Wizard** will appear. Select the Category **Pages** then select **Create News Item**.


Asset Creation Wizard
Select the type of asset you want to create
Categories
Pages
Files
Create Page
Pages are used to create standard content within your site such as a page with headings, hyperlinks and images.
Create Single Calendar Event
Calendar events are used to define an event with a fixed start and end date and time.
Create Recurring Calendar Event
Calendar events are used to define an event with a fixed start and end date and time.
Create News Item
A News Item allows you to add articles to your site. These articles could be anything from a media release to a general article on your site.

3. The **Create News Item Wizard** will load:
    - **Enter** a title for your news item
    - Click on **Select Parent** to define the assets location
    - Using the **Asset Finder** screen highlight the parent asset (in this instance the **News Items** folder which should be nested under the news listing page) and click on **Select**



    - The **Create News Item Wizard** will then re-appear showing the create location details
    - Click on **Create** to complete the process

4. The asset has now been created. The options available are:
    - Close the wizard - which will return you to the last screen you were viewing
    - Restart the wizard - to create another asset
    - Edit - to start editing this asset

5. Select **Edit** and click on the **Content** icon.

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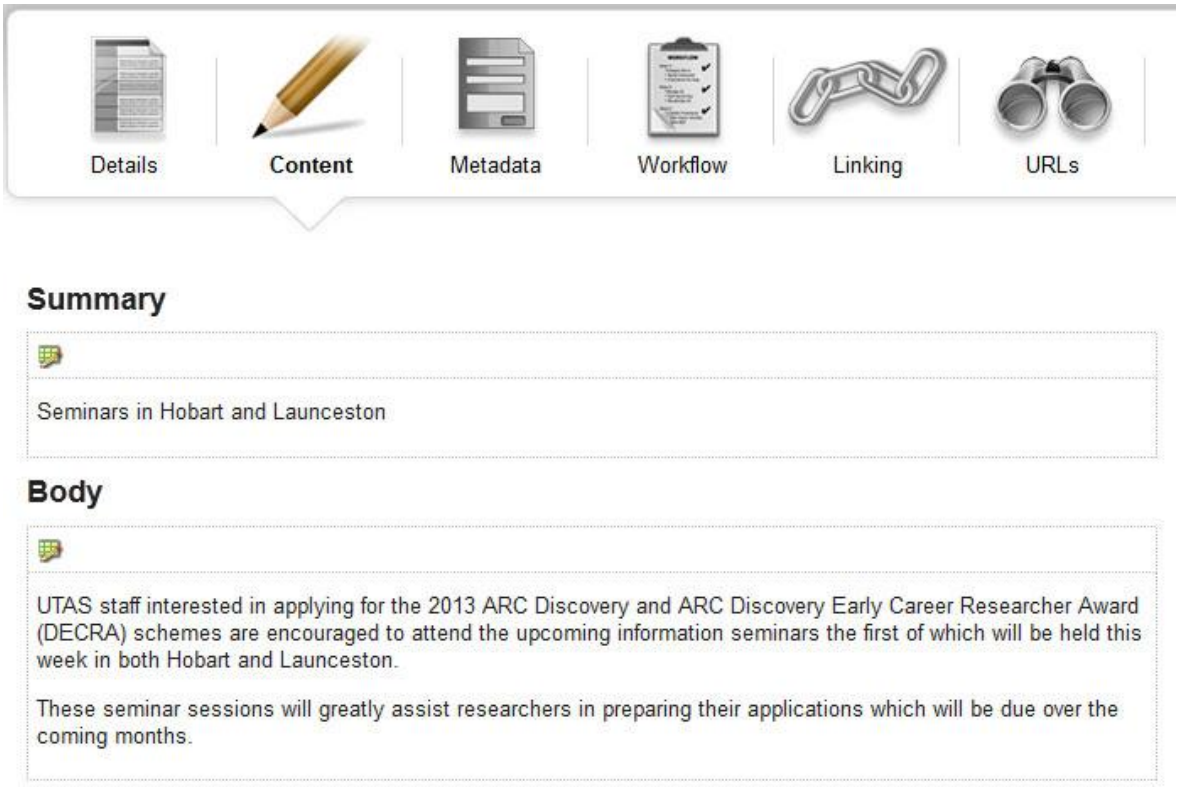
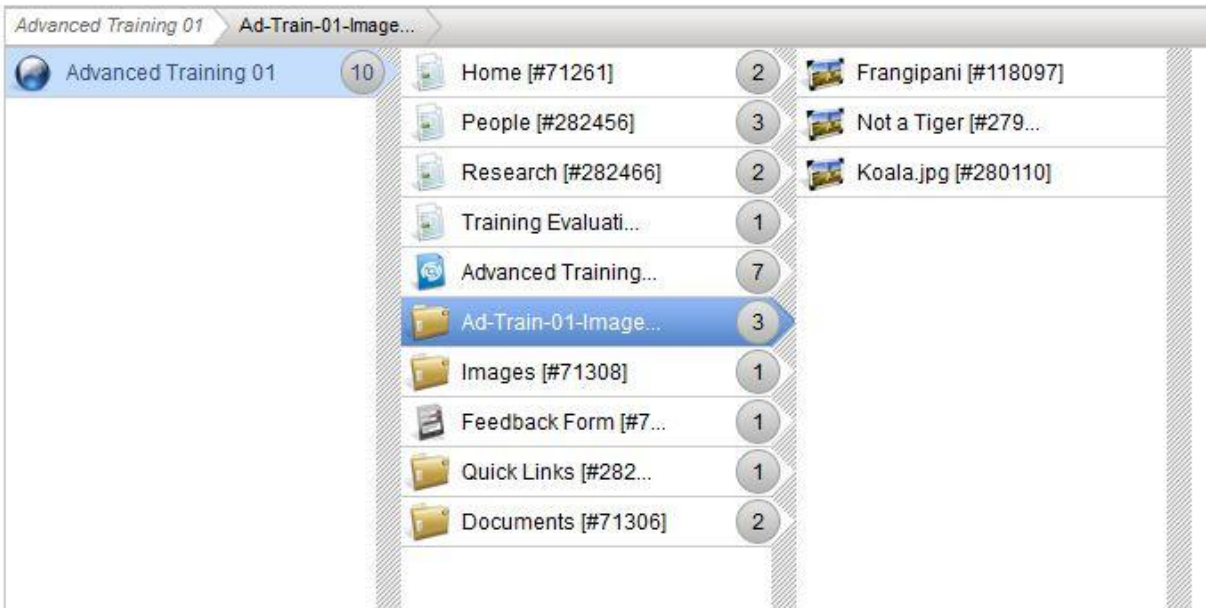
6. Click on the green **Edit Contents** icon to **enter** the **Summary** for the news item (restricted to 120 characters only).
7. Click on the green **Edit Contents** icon to **enter** the news item **Body text**.


Details
Content
Metadata
Workflow
Linking
URLs
Summary
Seminars in Hobart and Launceston
Body
UTAS staff interested in applying for the 2013 ARC Discovery and ARC Discovery Early Career Researcher Award (DECRA) schemes are encouraged to attend the upcoming information seminars the first of which will be held this week in both Hobart and Launceston.
These seminar sessions will greatly assist researchers in preparing their applications which will be due over the coming months.

8. Add an image to your news item.

    - Create a new image into the news images folder



    - Change status of image to *Approve and make live*
    - Use the Asset Finder to locate your news item
    - On the details screen under *Thumbnail* click change and select the news image

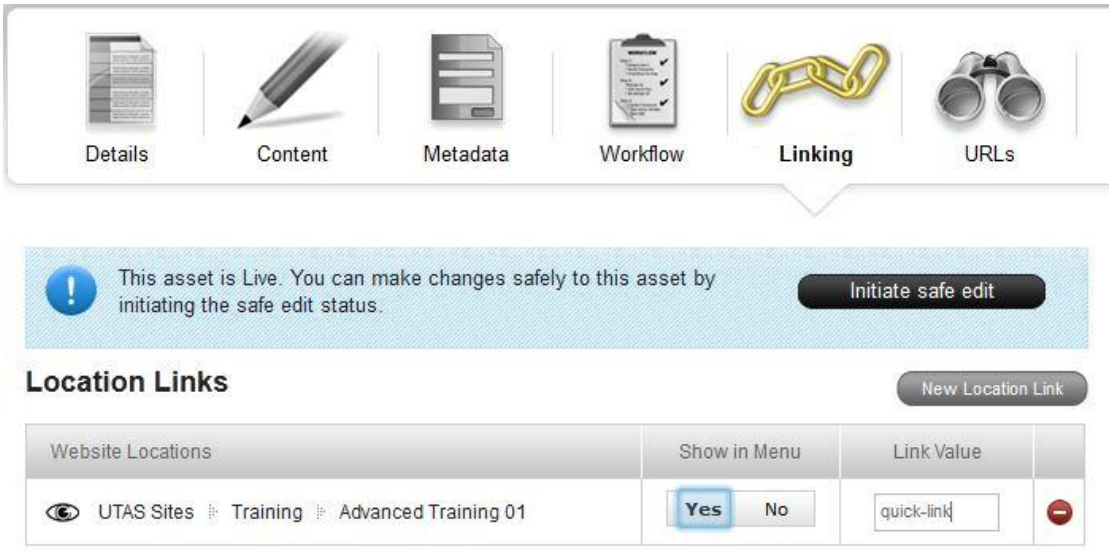
- The details screen will now show the details of the thumbnail image
- Save changes

9. Make your news live on the details screen then refresh your home page to see the newly created news item in the news listing.

How to add a Quick Link

Using EES it is easy to add a new page to the quick links area of the navigation menu

1. Create new page (This asset can be standard page or redirect page) with parent location the Quick Links folder
2. Populate the page with contents and make it live
3. For redirect pages, add the redirect URL to the details screen
4. Go to the Linking screen of the asset and type **quick-link** into the *Link Value* field
5. Save changes and preview



Problem solving

1. If the quick link doesn't appear, check that the link value in the Linking screen is correct. Any deviations, even a space, will disrupt this function.

2. Matrix cache may also be preventing the link from appearing. You may need to wait up to three hours to view the change.

How to add a Banner Image

1. Select an image that will suit the horizontal banner space
2. Crop image to dimensions 983px width by 155px height
3. Add image to the **Home > nested content > banner images** folder
4. Make image live
5. Go to the Linking screen and add **feature-image** to the *Link Value* Field

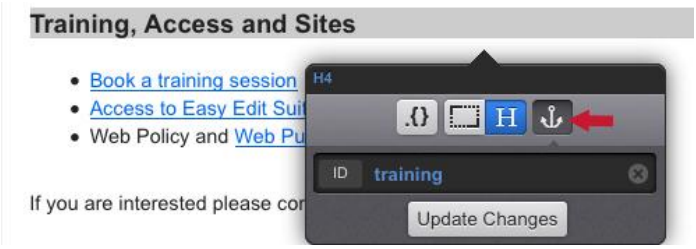
You can add several banner images to each site; each time the browser is refreshed it will randomly select one banner image to display.

How to Add an Anchor

An anchor allows you to link to a particular part of your page.

6. To create an anchor place your cursor where you want your anchor point to be, and then press the anchor icon, which is found in the WYSIWYG menu. The anchor item also appears as part of the inline editor when you select text within the content container.

7. The Insert Anchor popup screen will appear. **Enter** a simple anchor ID into the text field as shown. **Update Changes**.



7. Highlight your text where you wish to create a link to your anchor. Select the link icon.

6. Use the Asset Picker to navigate to the page you want your anchor to be on and click Select.

7. Enter the name of the anchor in the *Anchor Name* field and click **Update Changes**. The name you enter in this field must match the name you entered when you created the anchor. When you click on this link it will take you to the start of the content that you entered.

If you want to delete an anchor, highlight the text that has been anchored and the inline editor will appear. Click on the *Remove Anchor* icon and **Save**.

8. You have now created a link that will go to your anchor point.

How to optimise an image for the web

1. Locate the image you need to edit
2. Right click on the image and go to: **Open With > Microsoft Office Picture Manager**
3. Microsoft Office Picture Manager will open

NB: Picture Manager can also be found in your program menu by going to:
Start > All Programs > Microsoft Office > Microsoft Office Tools > Microsoft Office Picture Manager

Crop

1. In the top toolbar, go to: **Picture > Crop**
2. A crop menu will appear on the right hand side of the screen and the image will now have black crop lines surrounding it
3. To crop, drag the lines until you have the desired result
4. Once finished, select the **OK** button in the Crop menu
5. To exit the crop function, close the crop menu

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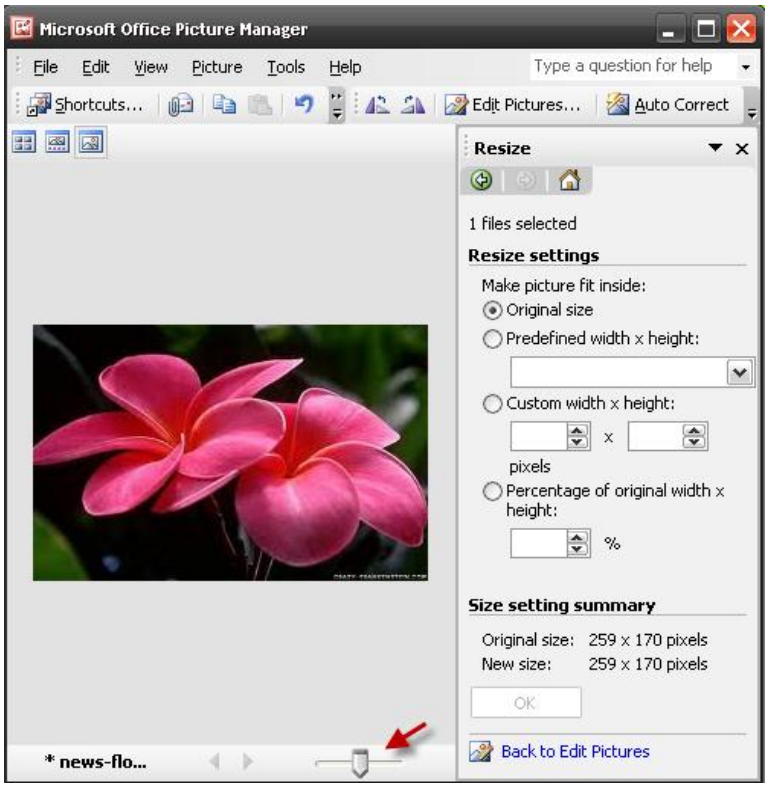
Resize

1. In the top toolbar, go to: **Picture > Resize**
2. A resize menu will appear on the right hand side of the screen
3. To resize, choose one of the methods below:
    a. At the bottom of the screen you will see a scale indicator. Move the bar from side-to-side to resize your image. Once it is the desired size, select **OK** in the Resize menu



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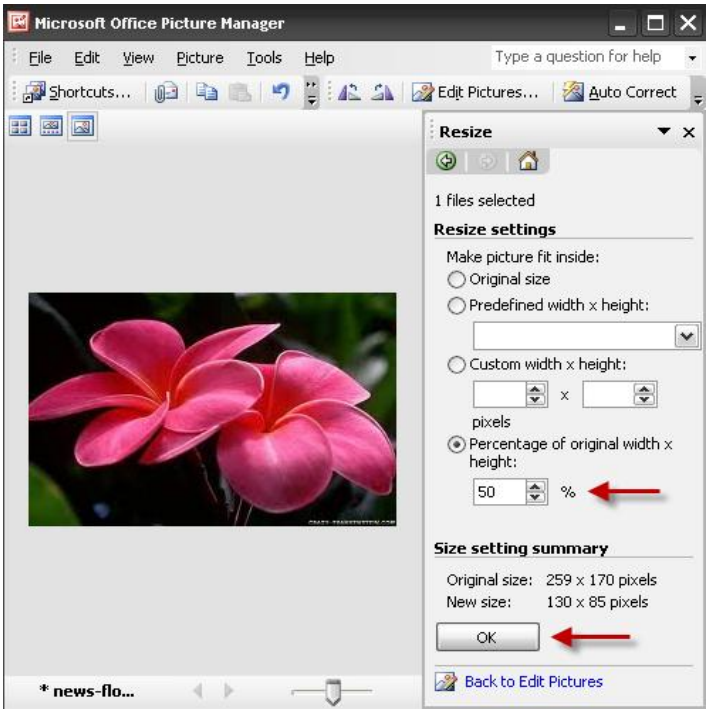
b. If you know exactly what size you would like the image to be, **enter** the desired height and width in pixels into the **Custom Width by Height** option
c. Alternatively, **enter** the **Percentage of original width x height**



4. Once finished, select the **OK** button in the Resize menu
5. To exit the resize function, close the crop menu

Save for Web

1. In the top toolbar, go to: **Picture > Compress Pictures**
2. A compress pictures menu will appear on the right hand side of the screen
3. Select the radio button for **Web pages**
4. Select **OK**
5. To exit the crop function, close the crop menu

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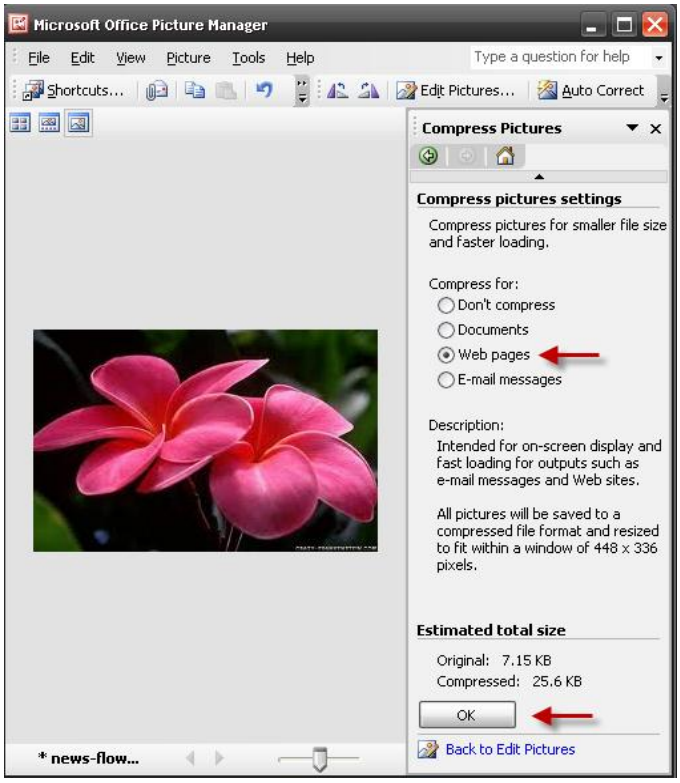
Microsoft Office Picture Manager
File Edit View Picture Tools Help
Type a question for help
Shortcuts...
Edit Pictures...
Auto Correct
Compress Pictures
Compress pictures settings
Compress pictures for smaller file size and faster loading.
Compress for:
Don't compress
Documents
Web pages
E-mail messages
Description:
Intended for on-screen display and fast loading for outputs such as e-mail messages and Web sites.
All pictures will be saved to a compressed file format and resized to fit within a window of 448 x 336 pixels.
Estimated total size
Original: 7.15 KB
Compressed: 25.6 KB
OK
Back to Edit Pictures
* news-flow...

How to add an image asset and insert into content

1. Refer to page 18 instructions on how insert images into content.

Contact us

For further queries or problems relating to the use of Edit+ please contact the Service Desk:
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Phone: x1818

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